



Kanso Native Housing Summit

Occupancy Management: Homes for your Tribal Members

July 29, 2024, at 1:00 P.M.

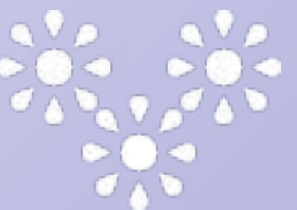
Location of Training 1



Andrew Selberg

Account Executive

Sales & Marketing





Joe Prince

Operations Manager

Client Support & Data Operations



Aaron McIlwaine

Data Conversion Specialist

Data Operations Team

Amy Vermette

Account Manager

Client Support Team

Session Outline

Occupancy Vertical

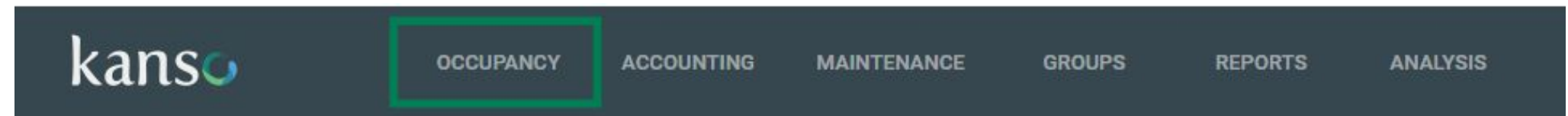
Household Overview

Groups Feature

Units Overview

Letter Templates

Occupancy Vertical



- **Households Tab**
 - List of all current households
 - New households and groups can be added here
- **Units**
 - List of all units
 - New units are added here
- **Vendors**
 - Is used for creating landlords

Household Overview

This page gives a one page summary of important information across the entire household's profile

- It's important to provide as much detail as possible for each household member especially birthdays and "title"
- Head of Household vs. "other household members"
 - How to add, delete, and edit household info
 - Common scenario: new head of household
- Editing and updating contact information
- Archiving households
 - Used in place of "deleting"
 - Archive is found in the toolbox menu

Amy Vermette Household

Unit: Assigned to [100 North Street, 1 | Denver, CO 12121](#)

PPU: [P-055-0002](#)

OVERVIEW | TENANT LEDGER | TRACKING | NOTES | WAIT LISTS | DOCUMENTS | HOUSEHOLD HISTORY



Amy Vermette
Head of Household

[Bio](#) | [Demographics](#) | [Other](#)

Status: Assigned

Program: Public Housing

Project: Project-055

[Edit Profile](#)

Other Household Members

Amy Vermette + -

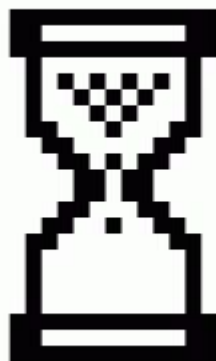
PHONE NUMBERS +

★ Mobile (123) 456-7891 [edit](#) | [delete](#)

EMAIL ADDRESSES +

★ Work support@kan... [edit](#) | [delete](#)

Waiting Lists




Used to organize your lists of applicants who are waiting for available units

- New waiting lists can be created from the waiting list tab under the Occupancy vertical
- Preference points can be created for each waiting list in order to control which order applicants will fall on the waiting list
- Position on the waiting list is determined by preference points and bedroom size
- Application date and time can be edited
- Applicants can be added to multiple waiting lists at one time
- When an applicant is moved into a unit the system will prompt you to remove the tenant from the waiting list

Unit Overview

UNIT OVERVIEW UNIT HISTORY MAINTENANCE HISTORY NOTES IMAGES DOCUMENTS

UNIT OVERVIEW	EDIT	ADDITIONAL INFORMATION	
Current Status	Assigned	Bedrooms	2
Address	100 North Street , Apt. 1 Denver, CO 12121	Bathrooms	5
Program	Public Housing	Handicap Accessible	No
Project	Project-055	1937 Unit	No
Housing Type	Not Applicable	Total Development Cost (TDC)	
Landlord	None	Income Limit Area	Not Specified
Utility Vendor	N/A		



Provides a summary of the unit and its history

- Unit info such as street address and bedroom size can be edited at any time
- Program and Projects cannot be changed once unit is created
 - In this case a new unit will need to be created
- Vacant units can be removed from inventory if needed
- Overriding Program settings: will tell the unit to ignore the program and project settings and instead follow only unit provided rental calc data
 - *This should be evaluated on a case by case basis and only used when absolutely necessary

Unit History and Maintenance

Unit History lists all households who were ever assigned, moved into, and moved out of the unit

Maintenance History lists all work orders ever created for the unit

- New work orders can be created from this tab as well as through the toolbox menu
- Work orders created will be tied to the unit and not to the household/tenant.
- However, work orders can still be charged to the tenant

Unit Notes, Images, and Documents

These features are used to provide optional additional information and records for the unit.

- The notes feature works identically to the the one for households however it saves the record for the unit specifically
- Images of the unit can be uploaded for reference
 - The image selected as default will appear on the household overview page
- Documents specific to the unit can be generated or added here

Household History and Documents

Tools



ASSIGN

UNASSIGN

MOVE IN

MOVE OUT

ANNUAL
CERTIFICATION

INTERIM
CERTIFICATION

CONVEYANCE
ELIGIBLE

CONVEY TITLE

ENROLL

TRANSFER UNIT

The Household History Tab is where you will find a history of all household actions performed for the household.

- Order of Operations = Assignment > Move In > Interim/Annuals > Move Outs
 - Actions can only be undone one at a time
- Use the toolbox to perform household actions
- Annual Certifications vs. Interim Recertifications
- Monthly Transaction are also displayed here

New Feature!

- **Transfer can be used when a tenant is moving to a new unit within the same program**

Documents Continued...

[Click Here to Generate Letters](#)



The documents tab is like a virtual file folder which holds all documents generated and uploaded for the household

- Documents such as TTPs or rent change letters can be configured to generate automatically when household actions are performed
- Documents can be generated with the sheet of paper icon
- Documents can also be uploaded and deleted
- Merge fields and custom merge fields can be added to letter templates to automatically fill specific information into the document
 - If you are needing assistance editing or adding merge fields to a letter template please contact the support team for assistance.

Notes

All Categories



Posted by:
amy.vermette@kansos.com
Category: Alert
Jul 15, 2024 4:16:54 PM

Amy is awesome, 5/5 Stars!



Posted by:
amy.vermette@kansos.com
Category: Other
Jul 15, 2024 4:16:05 PM

No really, she's amazing.



System Alerts

Posted by: amy.vermette@kansossoftware.com

Jul 15, 2024

Amy is awesome, 5/5 stars!



don't show this alert again

Notes is used for providing additional information or updates related to the household members.

or from the

generate in
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page
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Household Notes Individual Report

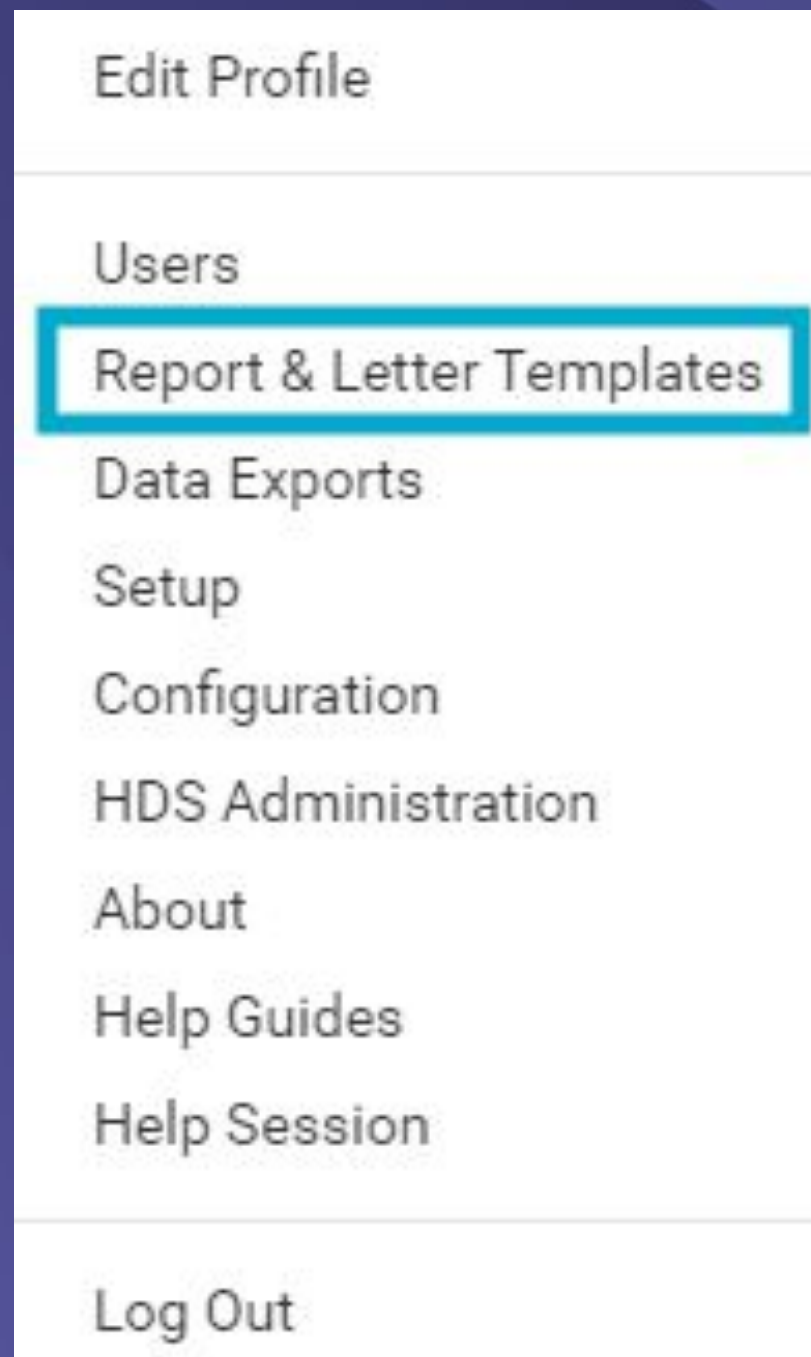
Groups Feature

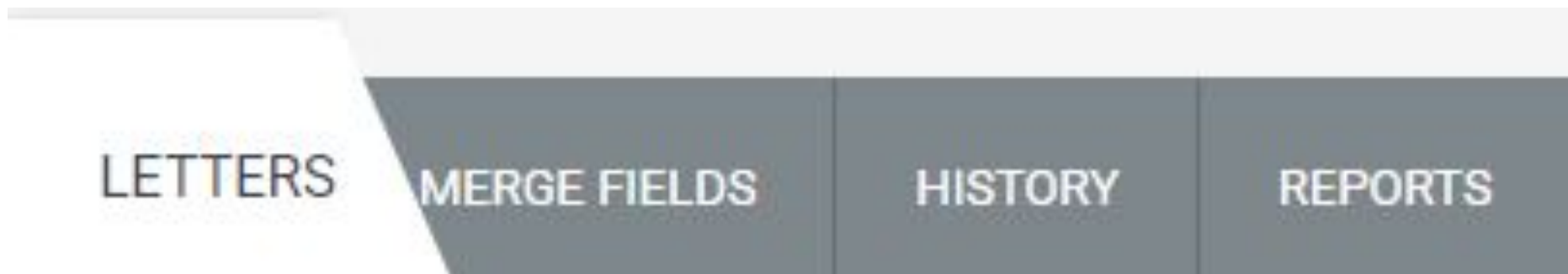
This feature allows you to group multiple tenants together in order to perform one action for all group members at a time.

- Group members can be added or removed at any time
- Group actions include: generating document, posting a one-time transaction, as well as interest-allocations
- All group actions will be saved under “history”
 - Document generated for a group can be bulk printed
 - These documents will also appear under the documents tab for each individual household

Reports and Letter Templates

Letters Overview



- 
- Letter templates can be found under the user dropdown menu
 - Your site comes with 23 default letter templates
 - Kanso will create up to 25 custom templates for you for no additional cost
 - Default vs. Custom templates
 - Uploading a new template
 - How to edit templates
 - Email Settings

Custom Letters

- What makes a custom letter template
 - What is a mergefield
 - what is a custom mergefield
- 25 custom template rule
- How to request a custom letter
- Additional training materials

Letterhead Image Placeholder

July 16, 2024

«hh_fname»
«hh_strapt»
«hh_csz»

RE: NOTICE OF ANNUAL INSPECTION APPOINTMENT

Dear «lbtTenant»

In accordance with the «pgmname» program requirements, your unit at «u_strapt», «u_csz», must be inspected annually to continue participation in the program.

The purpose of the annual inspection is to ensure that your unit is being maintained in a decent, safe, and sanitary manner.

«ha_name» has scheduled the inspection for:

How can we help you?

- 🗨 Letter from Group
- 🗨 Edit a Letter Template
- 🗨 Setting Letters to Download As Word Doc
- 🗨 Add a New Letter Template

Thank you to our
Sponsors!



sage



AMERIND
Protecting Our People

RAYMOND JAMES

AFFORDABLE HOUSING INVESTMENTS

Wagenlander & Heisterkamp, LLC
Attorneys at Law

Uflex
Your Money Your Terms



Summit Agenda for Remainder of Day

- Meeting the Supportive Housing Needs in your Community
2:30-4:30
- Maintaining your Homes for Future Generations
2:45-4:15 - Location