

## **Exhibit 5-2**

### **Applicant, Participant, and Owner Briefing**

#### **HUD Regulation 24 CFR 982.304**

Illegal discrimination: PHA assistance to family. A family may claim that illegal discrimination because of race, color, religion, sex, national origin, age, familial status or disability prevents the family from finding or leasing a suitable unit with assistance under the program. The PHA must give the family information on how to fill out and file a housing discrimination complaint.

### **1. Reasonable Accommodation**

Reasonable Accommodation requests may include documentation in an accessible format, accessible or alternate locations for briefing, alternate briefing delivery methods, or requests for persons outside the family to attend to assist the disabled family member. Requests for a reasonable accommodation are directed to the local AHFC office. See the Reasonable Accommodations exhibit.

### **2. Eligibility**

#### **HUD Regulation 24 CFR 982.301(a)**

PHA briefing of family.

(1) When the PHA selects a family to participate in a tenant-based program, the PHA must give the family an oral briefing.

#### **AHFC Policy**

AHFC has developed an electronic briefing. AHFC will offer a family the electronic briefing. The family may request an in-person or telephonic briefing.

#### **2.A Attendance**

Only one adult family member is required to complete the briefing for the family. The family may select the best adult to complete this process. If more than one adult per family will be attending an in-person class, contact the local AHFC office to make sure that space is available.

#### **2.B Family Member Behavior**

In the event that a person displays behavior that reflects on his/her ability to meet family obligations, his/her eligibility for housing may be reassessed.

### 3. Briefing Delivery

AHFC has several methods to deliver a briefing: AHFC's electronic briefing, individual family meeting, a class, or a teleconference.

#### 3.A Scheduling

##### AHFC Policy

1. AHFC will notify families in writing of the briefing date, time, and location. If there is a time constraint, AHFC may choose to confirm a briefing verbally.
2. If a family is unable to complete the electronic briefing process, the family is responsible for contacting AHFC to schedule a more appropriate briefing method for the family.
3. AHFC provides all materials necessary for a family to begin the shopping process once the briefing is complete.

#### 3.B Family Rescheduling

##### AHFC Policy

1. A family may contact AHFC within five (5) business days of the briefing notification date to reschedule a briefing.
2. AHFC will allow a family one opportunity to complete the briefing.
3. A family may need to re-certify or re-verify eligibility information due to a family's attendance delay.

#### 3.C First Missed Briefing Opportunity

##### AHFC Policy

1. If a family fails to attend or complete the first scheduled briefing without prior notice to AHFC, AHFC provides a final briefing opportunity.
2. The family will receive another written notification with their final briefing opportunity.

#### 3.D Second Missed Briefing Opportunity

##### AHFC Policy

1. Applicant Families – if an applicant family does not attend the second scheduled briefing and does not reschedule timely, AHFC will withdraw the applicant's application. The family will need to submit a new application for rental assistance.
2. Participant families may choose to shop prior to giving notice to an owner, particularly in limited rental market areas.
  - It is the family's responsibility to inform AHFC if the family wishes to remain assisted if the briefing process is not completed.
  - Participants who have given notice and fail to complete the briefing process will be terminated.

3. Incoming Portability Families- AHFC will not withdraw or terminate assistance. The shopping time for these families has already started, therefore after the second missed opportunity, AHFC staff will not make further attempts. The family is responsible for making contact prior to their voucher expiration date.

#### 4. Briefing Materials

##### **HUD Regulation 24 CFR 982.552(d)**

Information for family. The PHA must give the family a written description of:

- (1) Family obligations under the program.
- (2) The grounds on which the PHA may deny or terminate assistance because of family action or failure to act.
- (3) The PHA informal hearing procedures.

##### **AHFC Policy**

AHFC provides each family with the materials necessary to complete the briefing process. AHFC also maintains a web page accessible to the public that families may access at any time to receive additional briefing materials. Families without electronic access may be provided documents upon request by family.

#### 4.A Family Content

##### **HUD Regulation 24 CFR 982.301(a)**

PHA briefing of family.

- (1) ... The briefing must include information on the following subjects:
  - (i) A description of how the program works;
  - (ii) Family and owner responsibilities; and
  - (iii) Where the family may lease a unit, including renting a dwelling unit inside or outside the PHA jurisdiction, and any information on selecting a unit that HUD provides.
- (2) An explanation of how portability works. The PHA may not discourage the family from choosing to live anywhere in the PHA jurisdiction, or outside the PHA jurisdiction under portability procedures, unless otherwise expressly authorized by statute, regulation, PIH Notice, or court order. The family must be informed of how portability may affect the family's assistance through screening, subsidy standards, payment standards, and any other elements of the portability process which may affect the family's assistance.
- (3) The briefing must also explain the advantages of areas that do not have a high concentration of low-income families.
- (4) In briefing a family that includes any disabled person, the PHA must take appropriate steps to ensure effective communication in accordance with 24 CFR 8.6.

(5) In briefing a welfare-to-work family, the PHA must include specification of any local obligations of a welfare to work family and an explanation that failure to meet these obligations is grounds for PHA denial of admission or termination of assistance.

#### **4.B Owner Content**

##### **AHFC Policy**

AHFC includes the following owner information in each briefing packet.

1. Lead-Based Paint Disclosure form
2. Property Ownership Verification
3. Request for Taxpayer Identification and Certification
4. Housing Assistance Payments (HAP) Contract
5. Statement of policy on providing information about a family to prospective owners
6. An overview of the leasing process

To encourage participation in the program:

- AHFC sponsors the Housing Locator at <https://locator.ahfc.us>
- AHFC provides a location in each AHFC office where owners can post vacancies for families
- AHFC may conduct informational meetings for owners

#### **4.C Briefing Packet**

##### **HUD Regulation – 24 CFR 982.301(b)**

Information packet. When a family is selected to participate in the program, the PHA must give the family a packet that includes information on the following subjects:

- (1) The term of the voucher, voucher suspensions, and PHA policy on any extensions of the term. If the PHA allows extensions, the packet must explain how the family can request an extension;
- (2) How the PHA determines the amount of the housing assistance payment for a family, including:
  - (i) How the PHA determines the payment standard for a family; and
  - (ii) How the PHA determines the total tenant payment for a family.
- (3) How the PHA determines the maximum rent for an assisted unit;
- (4) Where the family may lease a unit and an explanation of how portability works, including information on how portability may affect the family's assistance through screening, subsidy standards, payment standards, and any other elements of the portability process which may affect the family's assistance.
- (5) The HUD-required "tenancy addendum" that must be included in the lease;

- (6) The form that the family uses to request PHA approval of the assisted tenancy, and an explanation of how to request such approval;
- (7) A statement of the PHA policy on providing information about a family to prospective owners;
- (8) PHA subsidy standards, including when the PHA will consider granting exceptions to the standards;
- (9) Materials (e.g., brochures) on how to select a unit and any additional information on selecting a unit that HUD provides.
- (10) Information on federal, State and local equal opportunity laws, and a copy of the housing discrimination complaint form;
- (11) A list of landlords known to the PHA who may be willing to lease a unit to the family or other resources (e.g., newspapers, organizations, online search tools) known to the PHA that may assist the family in locating a unit. PHAs must ensure that the list of landlords or other resources covers areas outside of poverty or minority concentration.
- (12) Notice that if the family includes a disabled person, the family may request a current listing of accessible units known to the PHA that may be available;
- (13) Family obligations under the program;
- (14) Family obligations under the program, including any obligations of a welfare-to-work family.
- (15) The advantages of areas that do not have a high concentration of low-income families.

## **5. Changes Before Issuance**

If a family reports changes that will affect their gross annual income, those changes must be processed before the family may receive a briefing.

- If the change will cause the applicant family to exceed the income limit for the program, the family is no longer eligible to receive a voucher
- If the change will cause the participant family's portion to exceed the payment standard, the family is no longer eligible to receive a voucher

## **6. Changes After Issuance**

See the Initial Examination Process and Interim Examination Process exhibits for changes reported after issuance but before leasing.

## **7. Definitions**

**HUD Regulation 24 CFR 982.4**

### **7.A Administrative Plan**

The plan that describes PHA policies for administration of the HCV program.

### **7.B Admission**

The point when the family becomes a participant in the program. The date used for this purpose is the effective date of the first HAP contract for a family (first day of initial lease term) in the tenant-based program.

### **7.C Applicant (Applicant Family)**

A family that has applied for admission to the HCV program but is not yet a program participant.

### **7.D Family**

A person or group of persons, as determined by the PHA consistent with 24 CFR 5.403, approved to reside in a unit with assistance under the program.

### **7.E Jurisdiction**

The area in which the PHA has authority under State and local law to administer the program.

### **7.F Owner**

Any person or entity with the legal right to lease or sublease a unit to a participant.

### **7.G Participant (Participant Family)**

A family that has been admitted to the PHA program and is currently assisted in the program. The family becomes a participant on the effective date of the first HAP contract executed by the PHA for the family (first day of initial lease term).

### **7.H Subsidy Standards**

Standards established by a PHA to determine the appropriate number of bedrooms and amount of subsidy for families of different sizes and compositions.

### **7.I Voucher Holder**

A family holding a voucher with an unexpired term (search time).

### **7.J Voucher (Rental Voucher)**

A document issued by a PHA to a family selected for admission to the voucher program. This document describes the program and the procedures for PHA approval of a unit selected by the family. The voucher also states obligations of the family under the program.

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