

Yardi Recertification Notice Instructions

How to preview, post, and verify annual recertification notices

The two things to remember

1) The Due to Send date range controls which residents appear. 2) REPORT only previews the residents; POST is what saves the notice dates in Yardi.

Notice timing

- First Notice = 120 days before the Scheduled Annual Recertification Date
- Second Notice = 90 days before the Scheduled Annual Recertification Date
- Final Notice = 60 days before the Scheduled Annual Recertification Date

Why the date range matters

The Compliance Report and Recertification Notice report do not use the exact same date logic. The Compliance Report looks at the Scheduled Annual Recertification Date. The Recertification Notice report calculates each notice date first, then checks whether that calculated notice date falls inside the Due to Send range. If the range starts too late, residents can be missing even though they appear on the Compliance Report.

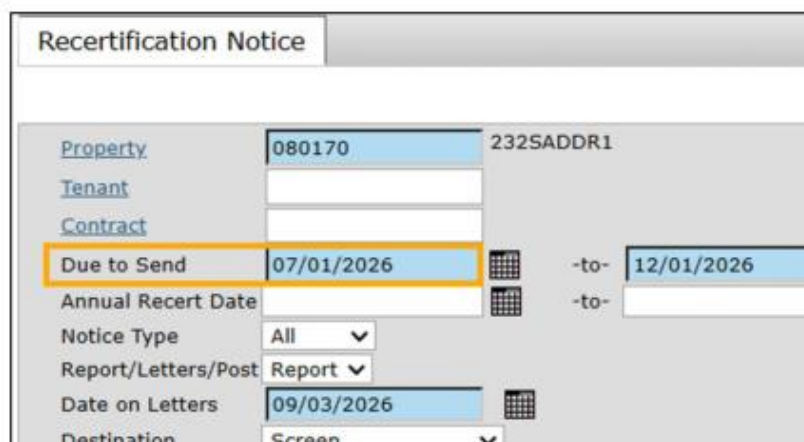
STEP 1 — Open Recertification Notices

Navigate to the Recertification Notice screen for the property you are working on.

STEP 2 — Enter a wide enough “Due to Send” date range

Enter the property and the Due to Send range. Make sure the range goes back far enough to include the notice dates you need. Yardi’s example showed that a range beginning 09/03/2026 missed residents, while expanding it back to 07/01/2026 allowed the expected residents to populate.

Screenshot 1:



Recertification Notice	
Property	080170 232SADDR1
Tenant	
Contract	
Due to Send	07/01/2026 -to- 12/01/2026
Annual Recert Date	
Notice Type	All
Report/Letters/Post	Report
Date on Letters	09/03/2026
Destination	Screen

Example from Yardi: a wider Due to Send range (07/01/2026 through 12/01/2026 on the screen shown).

Quick rule

If someone appears on the Scheduled Annual Recertification/Compliance Report but not on the Recertification Notice report, first widen the Due to Send start date and run the report again.

STEP 3 — Choose the notice type

Select First, Second, Final, or All, depending on the notices you are working with. Remember: First is 120 days, Second is 90 days, and Final is 60 days before the scheduled recertification date.

The screenshot shows the '50059 Certification' window. At the top, it says 'Passed validation'. Below that is the 'Resident Information' section with fields for Code (00012475), Name (Pqvatz Zmet), Address (24369SADDR1, 24369SADDR2), City-State-Zip (24369sCity , ZZ 53206), Property (000170), Unit (103), Status (Current), Office, Home, Lease Sign (10/17/2022), Lease From (10/17/2022), Lease To (09/30/2023), Move In (10/17/2022), and Move Out. There are buttons for 'Help', 'HUD 4350.3', and 'Family Info'. At the bottom, there are tabs for 'Basic', 'Household', 'Income and Expenses', 'Previous HOH', and 'Notice Dates'.

The resident Notice Dates screen shows where the first, second, and final notice dates are stored.

STEP 4 — Select REPORT and click Submit

In the Report/Letters/Post dropdown, select Report, then click Submit. This is only a preview. It shows which residents are eligible based on your selections, but it does not save notice dates to the database.

The screenshot shows the 'Notice Dates' screen. It has fields for '1st (120 day) Notice', '2nd (90 day) Notice', and '3rd (Final 60 day) Notice'. There is also a 'Notice Response' field and an 'Update Notice Response' button.

Screenshot 2:

The screenshot shows the 'Recertification Notice - 50059' screen. It has fields for 'Property' (080170), 'Tenant' (232SADDR1), 'Contract', 'Due to Send' (06/01/2026), 'Annual Recert Date' (10/01/2026), 'Notice Type' (First), and 'Report/Letters/Post' (Report). There are also date ranges: 'Due to Send' from 06/01/2026 to 12/01/2026, and 'Annual Recert Date' from 10/01/2026 to 10/01/2026.

Select Report to preview eligible residents.

STEP 5 — Review the resident list

Check the report to make sure the expected residents appear. If residents are missing, go back and widen the Due to Send date range before posting anything.

Advanced

Submit Clear Help

File or Code: rs_Aff_Notice_Crystal.txt

Screenshot 2:

Recertification Notice									
Building	Unit	Tenant	Tenant Name	Program	Contract No.	Recd. At	Notice Date	Prior Notice Date	
080170 (232SADDR1)									
First Notice	210	00012496	Sample Tenant	Sec 8	0000000000	00/00/0000	00/00/0000		
	210	00012496	Sample Tenant	Sec 8	0000000000	00/00/0000	00/00/0000		
	210	00012496	Sample Tenant	Sec 8	0000000000	00/00/0000	00/00/0000		
	210	00012496	Sample Tenant	Sec 8	0000000000	00/00/0000	00/00/0000		

Example: when the date range is wide enough, the expected first, second, and final notice groups populate.

STEP 6 — Change REPORT to POST and click Submit

Once the preview is correct, return to the Recertification Notice screen. Change Report/Letters/Post from Report to Post and click Submit. POST is the step that updates and saves the notice dates in Yardi.

Total First Notice 210 00012496

Total 080170 (232SADDR1)

Screenshot 6:

Recertification Notice - 50059

Property 080170 232SADDR1

Tenant

Contract

Due to Send 06/01/2026 -to- 12/01/2026

Annual Recert Date 10/01/2026 -to- 10/01/2026

Notice Type First

Report/Letters/Post Post

Date on Letters 09/01/2026

Change the dropdown to Post before submitting.

Advanced

Submit Clear Help

File or Code: rs_Aff_Notice_Crystal.txt

Screenshot 7:

Recertification Notice - 50059

Property 080170 232SADDR1

Tenant

Contract

Due to Send 05/01/2026 -to- 12/01/2026

Annual Recert Date 09/01/2026 -to- 09/01/2026

Yardi example using Post with a wider Due to Send range.

Important

Do not stop after running REPORT. If you only run Report, the notice dates will not populate on the Compliance Report.

STEP 7 — Verify the dates on the Compliance Report

After posting, open the Compliance Report and run Scheduled Annual Recertification. Confirm that the First Notice, Second Notice, and/or Third/Final Notice dates now appear for the residents you posted.

The screenshot shows the 'Compliance Reports' interface. At the top, there are filters for Property (000170), Contract, Building, Unit Type, Unit, and Tenant. Below these are fields for Tenant Status (Current, Past), Next AR Due From (Month / Year), Report Type (Scheduled Annual Recertification), and Summarize By (Resident). On the right, there are checkboxes for 'Use AR Date Range' and 'Show Grid', a dropdown for 'Pending Certs Within' (30 Days), and a dropdown for 'Program Type' (50059, Tax Credit, HOME). Below the filters, a table titled 'Scheduled Annual Recertification' is displayed. The table has columns: Unit, Resident Code, Head of Household Name, Status, Scheduled Recert, First Notice, Second Notice, Third Notice, Tenant Response, and Program. The 'First Notice' column is highlighted with a yellow box. The table shows two rows of data for units 100 and 105, both with a status of 'Current' and a scheduled recert date of 10/01/2026. The 'First Notice' dates are 09/01/2026. The 'Total' row shows 2 units. Below the table, there is a 'Pending Certs: Overdue' section.

Unit	Resident Code	Head of Household Name	Status	Scheduled Recert	First Notice	Second Notice	Third Notice	Tenant Response	Program
100	10013475	Morg, Odgen	Current	10/01/2026	09/01/2026				50059
105	10012516	Oghed, Ushid	Current	10/01/2026	09/01/2026				50059
Total	2								

After Post is completed, the notice dates should appear in the Compliance Report.

Troubleshooting Checklist

- **Resident is on Compliance Report but missing from Recertification Notices:** Widen the Due to Send start date and run Report again.
- **Resident appears on Report, but notice date is blank on Compliance Report:** Make sure you changed Report/Letters/Post to Post and clicked Submit.
- **Not sure what date should be included:** Work backward from the Scheduled Annual Recertification Date: 120 days for First, 90 days for Second, 60 days for Final.
- **Preview looks wrong:** Do not Post yet. Correct the date range/notice type and rerun Report first.

Bottom line

Run REPORT to check the list. If the list is correct, run POST to save the dates. Then verify the dates on the Compliance Report.