Instruction Guide For

On-Site Managers

Detail Format

Version 4.5

TABLE OF CONTENTS

1. How Do I Log In? 1

1A. First Time Log-In 2

2. Navigating the System 3

3. List of Projects Assigned 4

4. Annual Owner Certification 5
   - A. Completing the Form 5
   - B. Printing the Form 9
   - C. Internet Submission 10

5. Buildings Sub-Menu 11

6. Units Sub-Menu 13
   - A. Unit Definition 14
     - 1. Create a New Unit 15
     - 2. Update an Existing Unit 16
     - 3. Delete a Unit 17

7. Tenant Processes 18
   - A. New Certifications and Recertifications . . . 18
     - A-1 Head of Household Information . . . 19
     - A-2 Household Information 20
     - A-3 Income 22
     - A-4 Assets 25
     - A-5 Unit Rent 27
   - B. Printing the Tenant Certification Form . . . 29
   - C. Mark Unit as Ready to Submit 30
   - D. View or Modify Current Certification . . . 31
   - E. Delete a Tenant Certification 32
   - F. Move-out a Resident 33
   - G. Tenant Unit Transfer 34
   - H. Submission of Occupancy Data 35

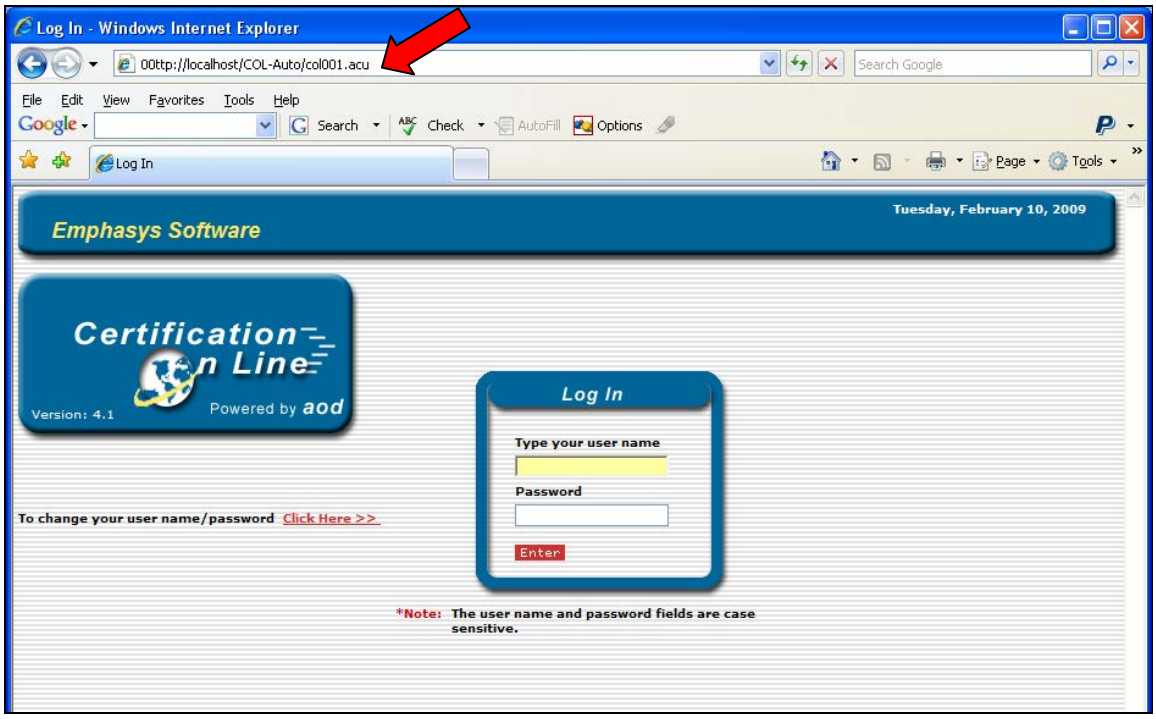
8. Reports 38

9. Other Information 39
   - A. Change Report Period 39
   - B. Upload Building Data 43

1. How do I log-in?

- Enter into the address box of your internet browser, the address that the Agency provides and **Enter**.

- This is the Log-In screen.

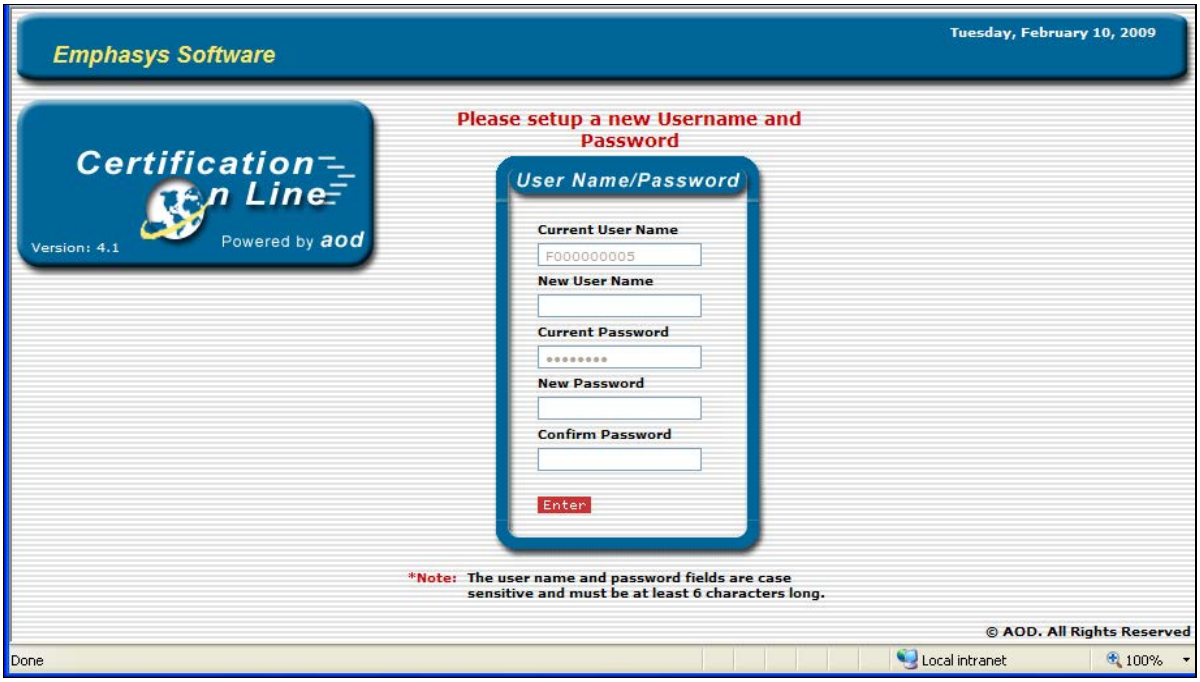


- ***PLEASE NOTE: The first time you log into the system, you will be taken to a second log-in screen. Please see the next page, 1A, for further information.***

- After entering the name and password you received from your Management Company, click on the **Enter** button or press **Enter** on your PC keyboard.

- You are now logged into the Certification On-Line (COL) reporting system. The Project List displays the projects that have been assigned to you.

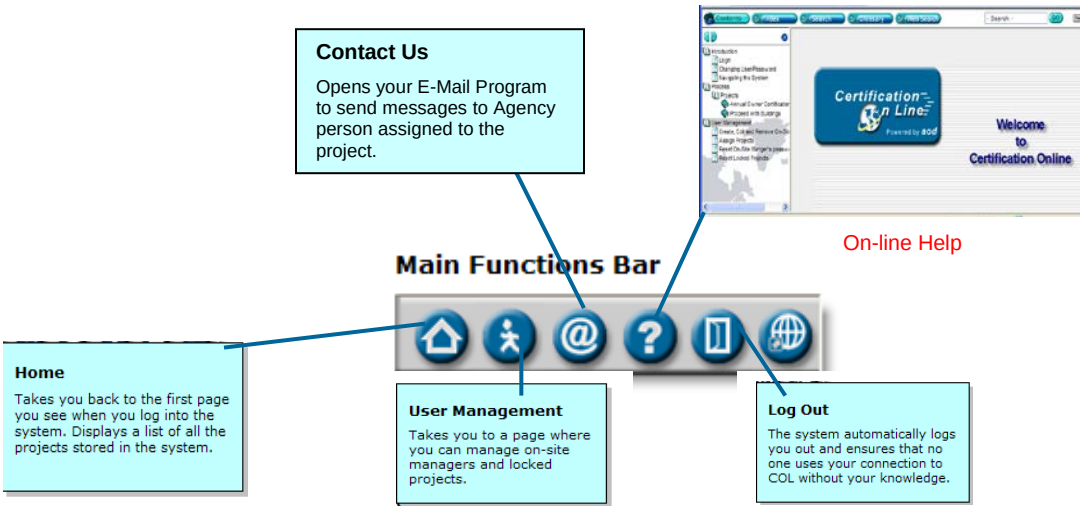
1-A. First Log-In Is Different

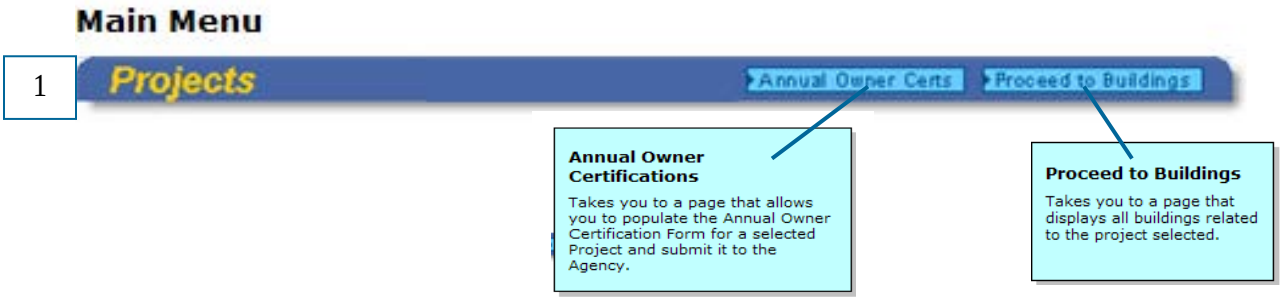


- The first time you log into the Certification On-Line reporting system, you will use the User Name and Password assigned by your Agency.
- After you enter that User Name and Password, you will be taken to a second screen (see above).
- On this screen you need to enter a new 'User Name' and a new 'Password'.
- **PLEASE NOTE: You will be taken to this screen on the first time *only* to allow you to establish codes known only to you.**
- When you have entered the required information, click on the **Enter** key or press **Enter** on your PC keyboard.

2. Navigating the System

The System consists of one main function bar, and the main menu bar, ***Projects,*** with two sub-menu bars, ***Buildings*** and ***Units***.

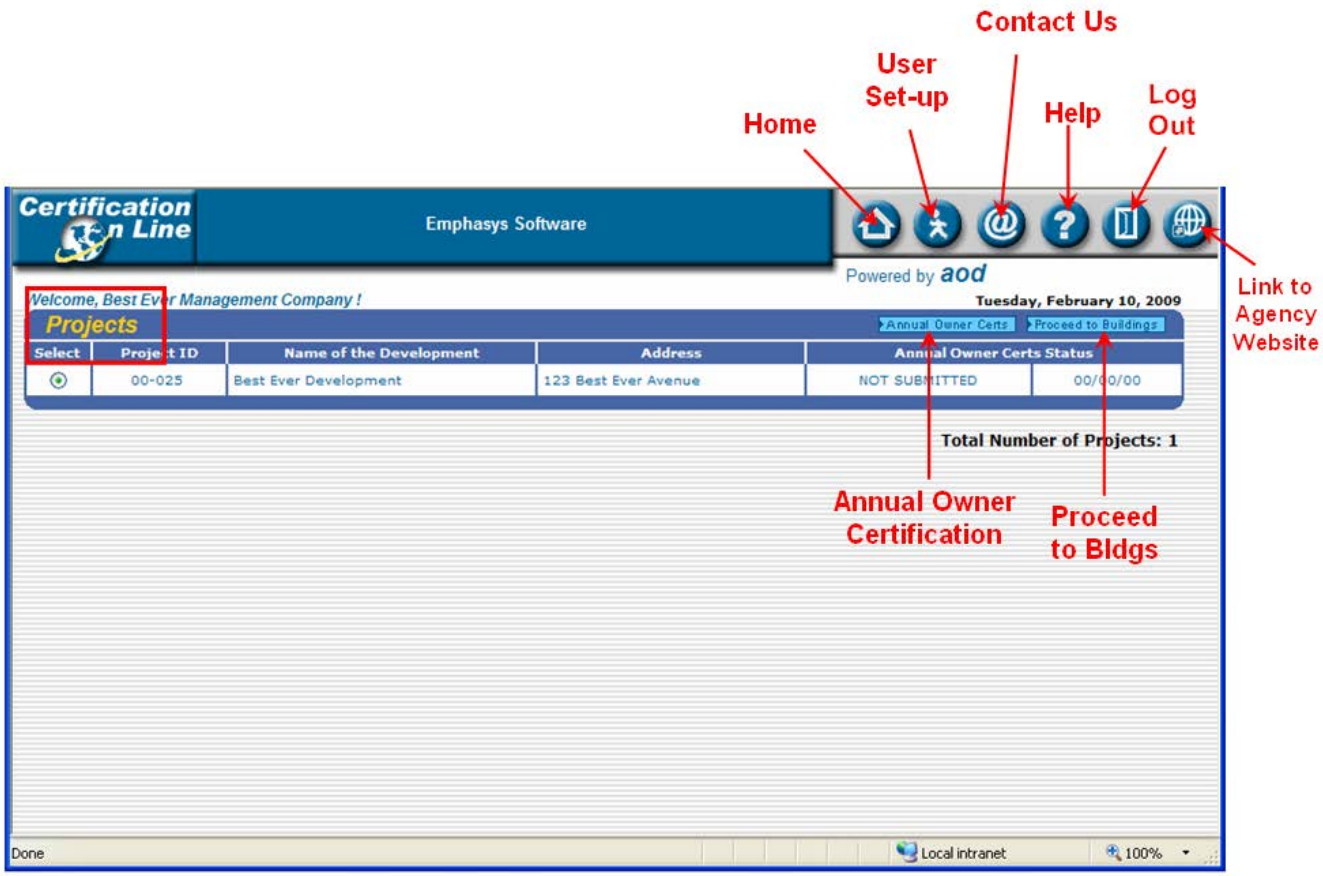




2

3

3. List of Projects Assigned to You



- All of the properties that are assigned to your User Name will be displayed here. They are listed by the LIHTC Project ID number. Next to the ID number is displayed the name and address of the property.

- In the boxes next to the address is listed the status of the Annual Owner Certification for the current reporting period. Now it displays 'Not Submitted' and the date field shows 00/00/00. This will be updated to "Submitted" and the date each time the Annual Owner Certification is submitted to the Agency.

- To select a property, click on the circle next to the Project ID of the property.

- At the top right hand corner of the ***Projects*** Main Menu are two buttons:
  A. **Annual Owner Certs**; and
  B. **Proceed to Buildings**

- The **Annual Owner Certs** button takes you to the form that the Owner is required to submit to the Agency on an annual basis.

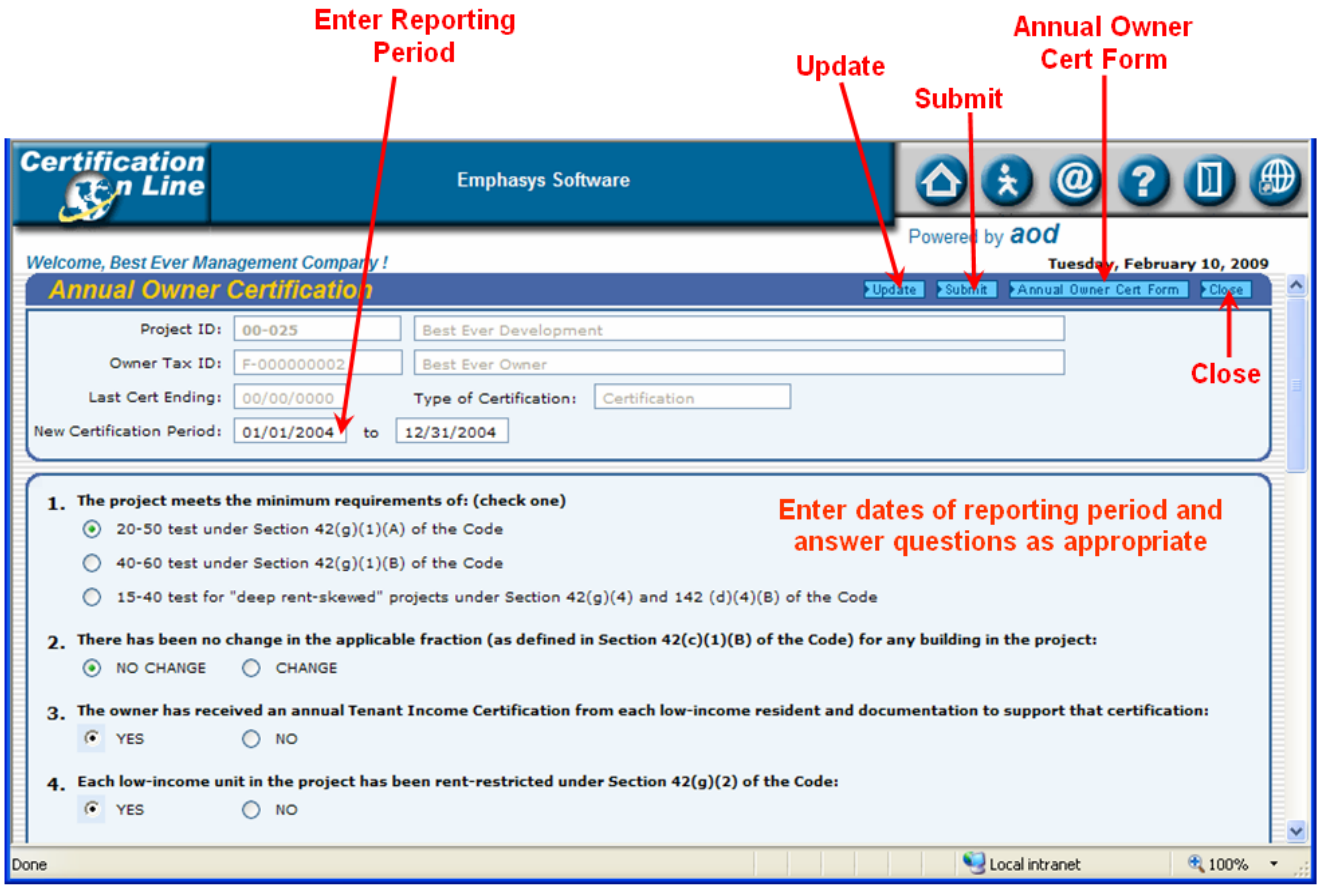
- The **Proceed to Buildings** button takes you to the ***Buildings*** sub-menu. From here the functions relating to tenant data begins.

4. Annual Owner Certification

A. Completing the form

- At the top right hand corner of the Projects box are two buttons:
  a. **Annual Owner Certs**; and
  b. **Proceed to Buildings**

- To access the Annual Owner Certification, first click on the circle next to the correct project. Then click on the '**Annual Owner Certs**' button.



- The Annual Owner Certification form is ready for completion. The property information is automatically entered into the fields on the first three lines.

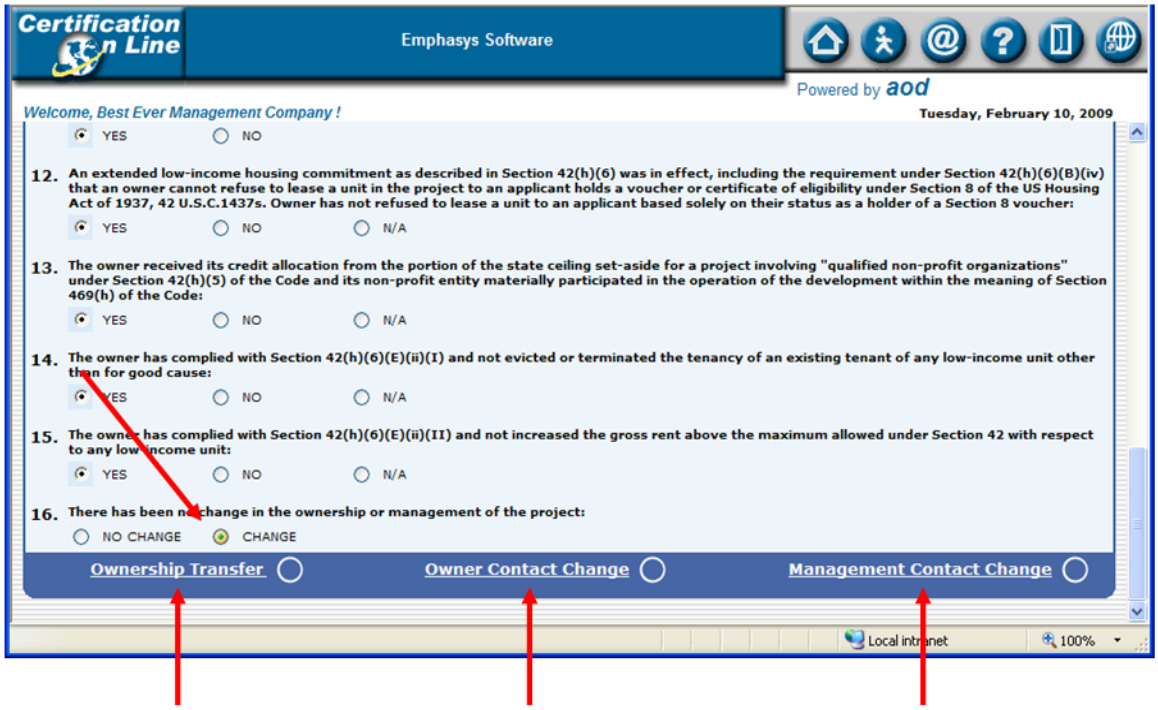
- The first entry you will make on this screen is to enter the **beginning and ending dates** of the reporting period you want to submit. You need enter only the numbers without any separating marks. For example, 010109. The numbers will then be converted to 01/01/2009.

- There are <u>16 questions</u> the owner is required to answer. Each question has a default marking. To change the answer, click on the circle next to the correct answer.

- To move through the page, you can use the **Tab** key on your PC keyboard or place your cursor on the blue vertical bar on the right side of the screen moving it up or down.

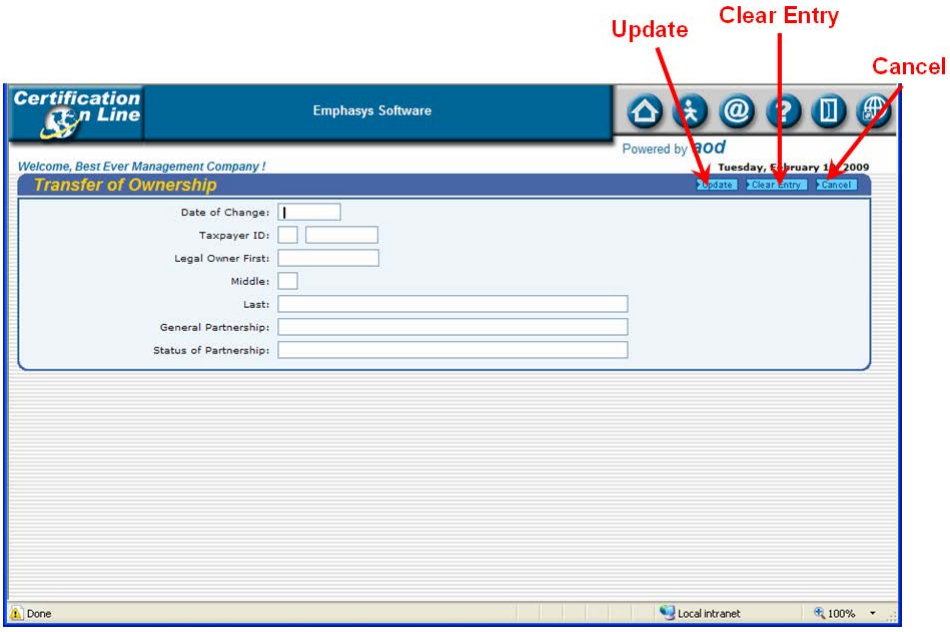
- Question number 16 addresses whether or not there has been a change in Ownership, or in the contact person for either the Ownership entity or Property Management. <u>If no changes have occurred, leave the circle next to **No Change** clicked.</u>

- If a change <u>has</u> occurred, click on the circle next to **Change**.



- When **Change** is selected, <u>three options appear</u>. Click on the appropriate choice.

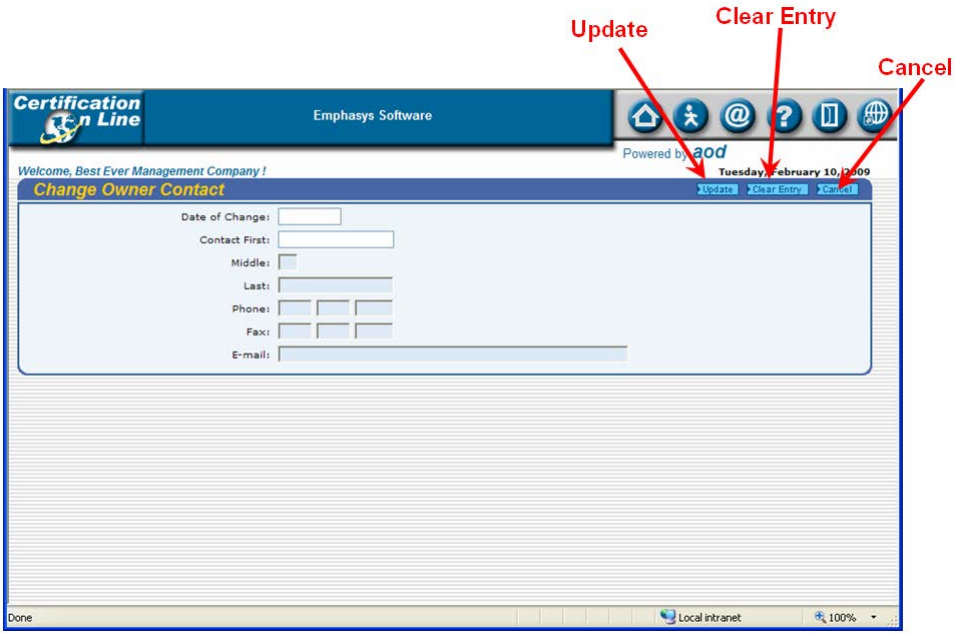
  1. The **<u>Ownership Transfer</u>** button will take you to the Transfer of Ownership screen.



  - To enter the information, click on the first white box. You can use the **Tab** key in addition to your mouse to move through the page.

- When complete, click on the **Update** button. You will return to the Annual Owner Certification screen.

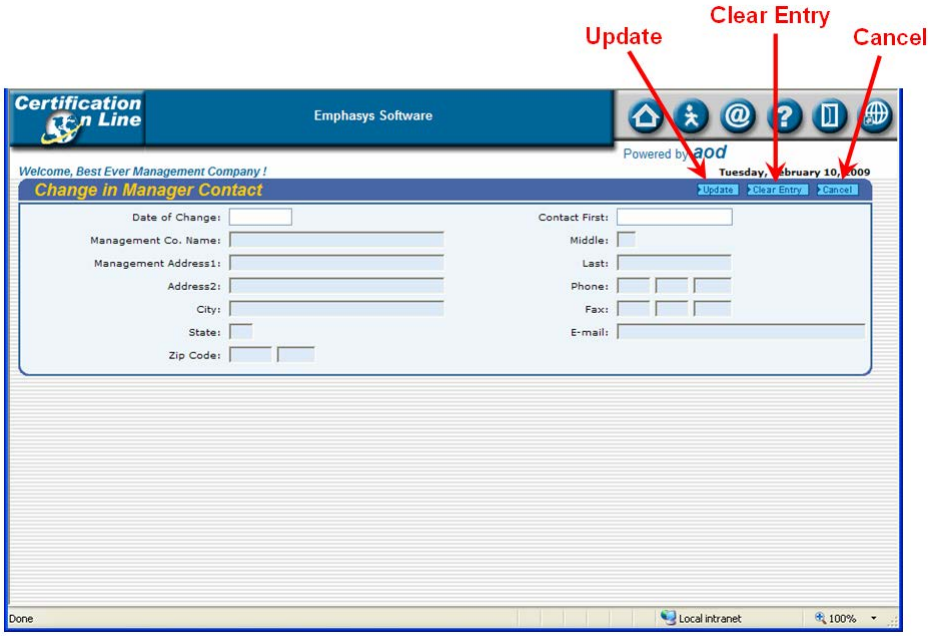
2. The **<u>Owner Contact Change</u>** button will take you to the Change Owner Contact screen.



- To enter the information, click on the first white box. You can use the **Tab** key in addition to your mouse to move through the page.

- When complete, click on the **Update** button. You will return to the Annual Owner Certification screen.

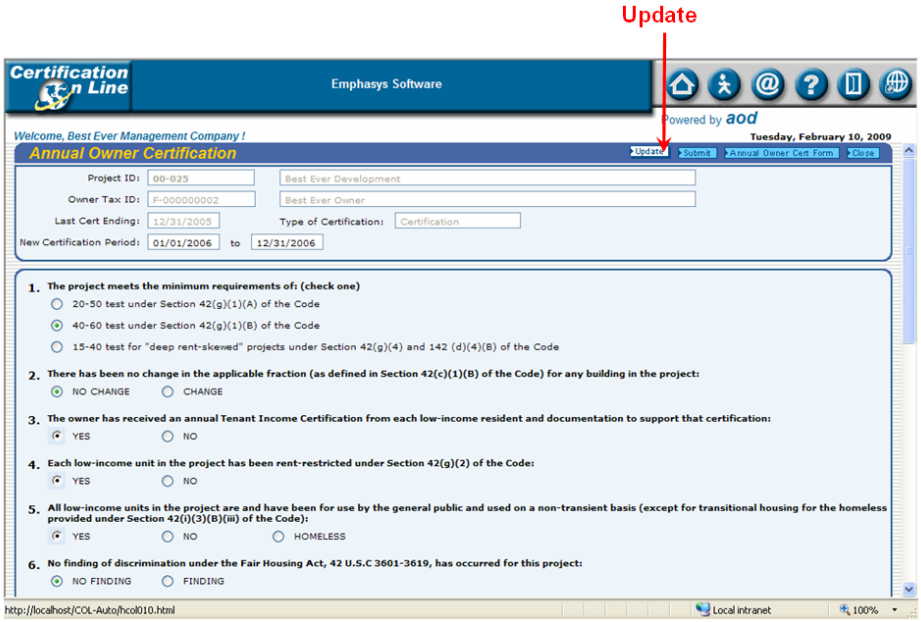
3. The **<u>Management Contact Change</u>** button will take you to the Change in Manager Contact screen.



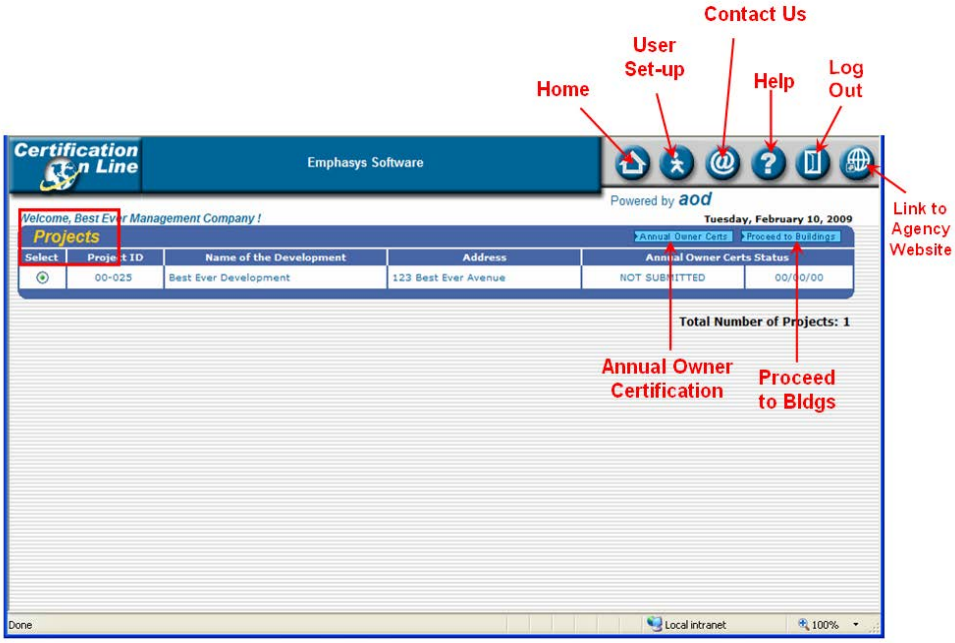
- To enter the information, click on the first white box. You can use the **Tab** key in addition to your mouse to move through the page.

- When complete, click on the **Update** button. You will return to the Annual Owner Certification screen.

- If you wish to stop at this point and not print or submit the form click on the **Update** button. You will return to the ***Projects*** menu, where you began.

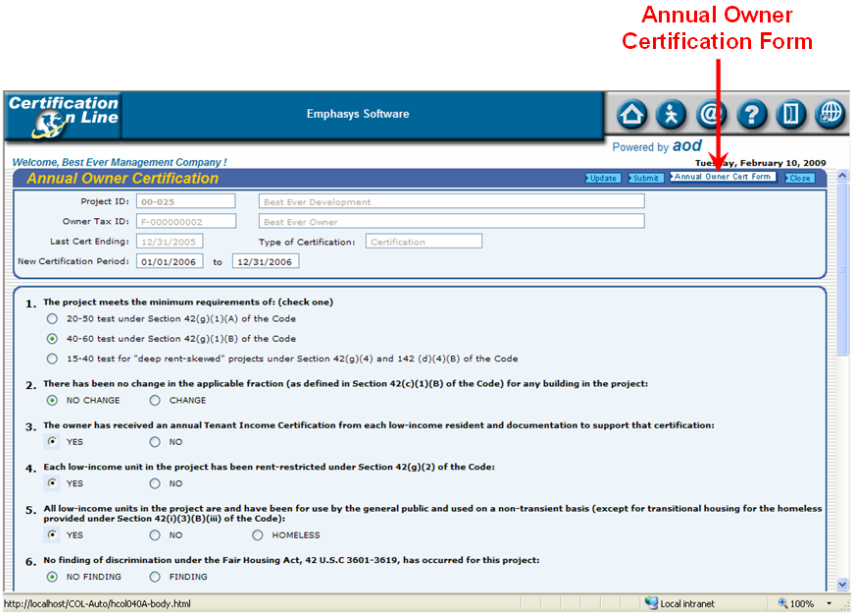


- If you don't want to save the information, click on the **Close** button. You will return to the ***Projects*** menu, where you began.

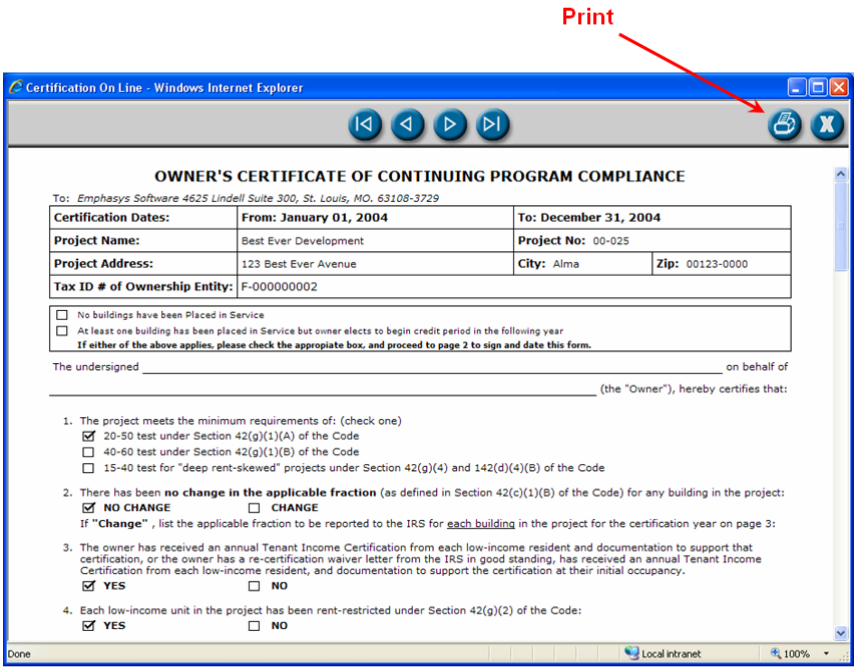


B. Printing the Form

- The completed Annual Owner Certification form can now be printed. To print the form, click on the **Annual Owner Cert Form** button.



- The completed form will display in a view window for review. If everything is correct, click on the button in the top right hand corner of the page. This will send the form to your printer.

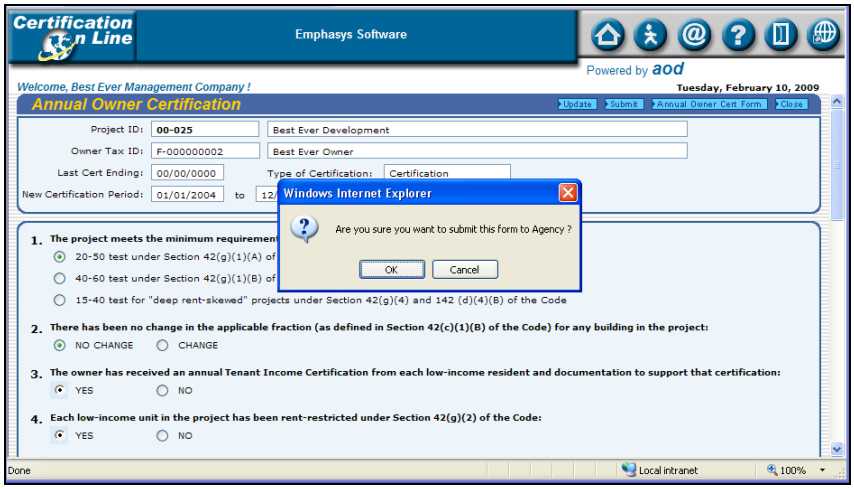


- The completed form can now be executed and notarized (if required by your Agency). Please send the executed original to the Agency and keep a copy for your files.

C. Internet Submission of Annual Owner Certification

PLEASE NOTE: Only the Management Company or Owner can submit the Annual Owner Certification Form.

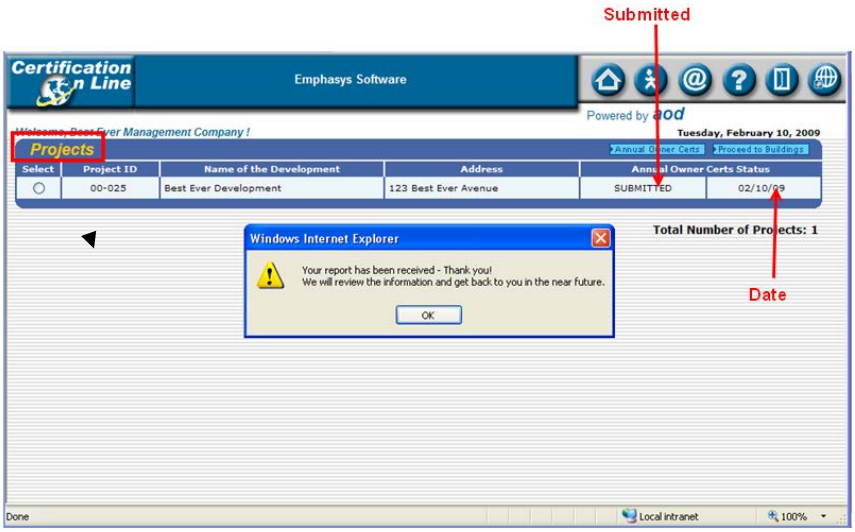
- To submit the Annual Owner Certification, click on the **Submit** button.



- A pop-up box will verify by asking if you are sure you want to submit the form. If you are ready, click on the **OK** button. If you are not ready, click on the **Cancel** button.

- If your Agency has chosen to receive email notifications, when you click on **Yes**, an email window will open. The "To" and "Subject" lines are already filled in. There is no need to add anything more. Click on the **Send** button. The Agency will be notified that your Annual Owner Certification has been sent.

- You will be returned to the ***Projects*** menu. Shortly you will receive a notice saying that your report has been received.



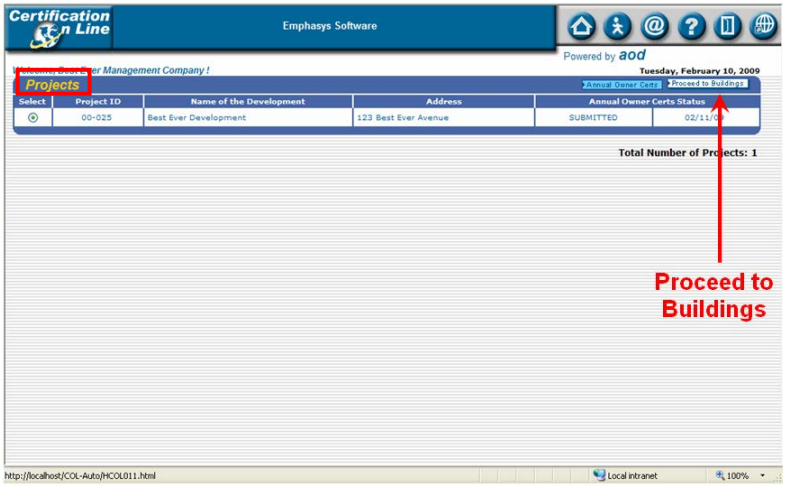
- The Annual Owner Cert Status box now shows **Submitted**, and the **date of submission**.

PLEASE NOTE: The Annual Owner Certification Form is to be filed on an Annual basis along with the Occupancy Data.

5. *Buildings* Sub-Menu

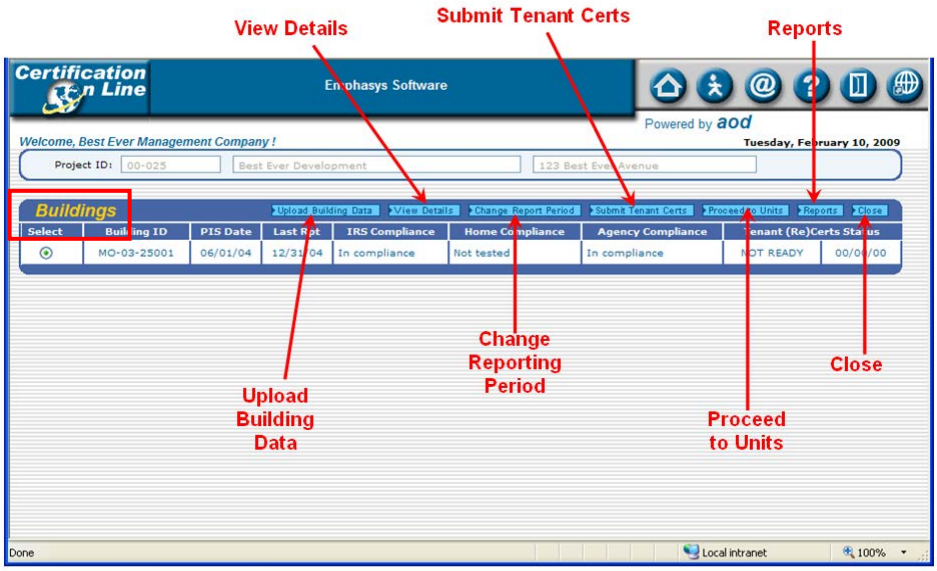
- At the top right hand corner of the ***Projects*** main menu box are two buttons:
  a. **Annual Owner Certs**; and
  b. **Proceed to Buildings**

- To access the section that deals with the tenant certification process, click on the circle next to the correct project. Then click on the **Proceed to Buildings** button.



- You will be taken to the ***Buildings*** sub-menu.

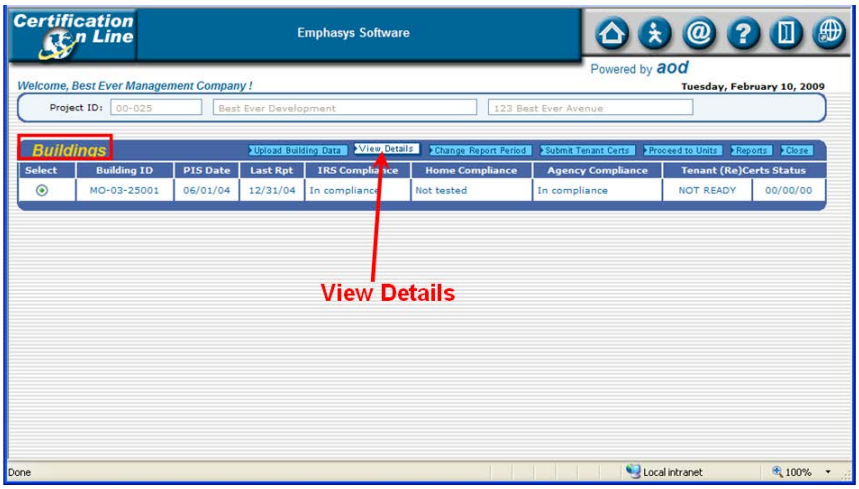
- All of the buildings in the selected project will be displayed. The buildings are listed in order by IRS Building Identification Number (the "BIN").



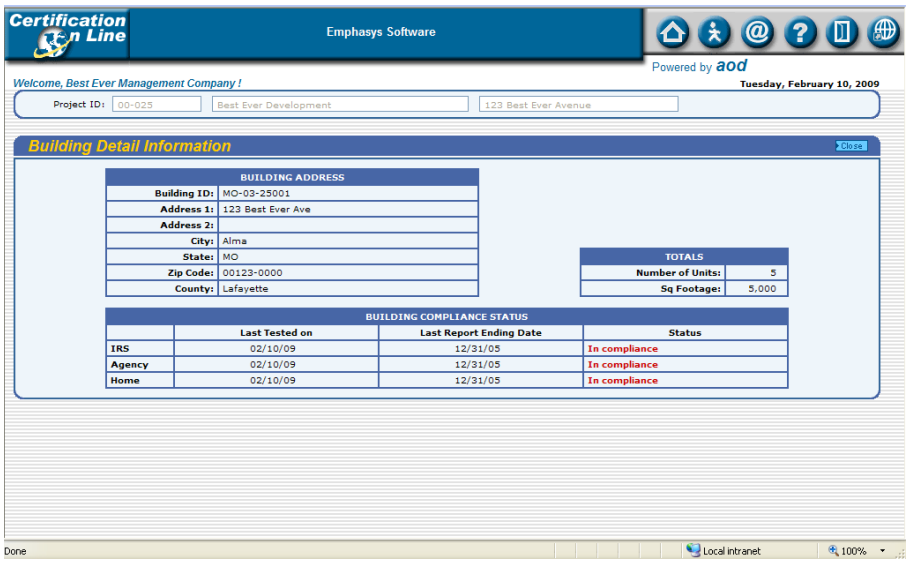
- At the top of the ***Buildings*** sub-menu are seven buttons:
  a. **Upload Building Data;**
  b. **View Details**;
  c. **Change Report Period**
  d. **Submit Tenant Certs**;
  e. **Proceed to Unit**;
  f. **Reports**; and
  g. **Close**

a. **Upload Building Data**- This button will be discussed in Section 8-B.

b. **View Details** – This button takes you to the Building Detail Information screen. This allows you to view the specific information for each building. First click next to the correct building. Then click on the **View Details** button.



- This is a view only screen. You cannot enter any information here. If there are errors in the information shown on the screen, contact the Agency.



- The information displayed in the Building Compliance Status box is current as of the **<u>last reporting period</u>**.

- To exit this screen and return to the ***Buildings*** sub-menu, click on the **Close** button.

c. **Change Report Period** – This button will be discussed later in Section 8.

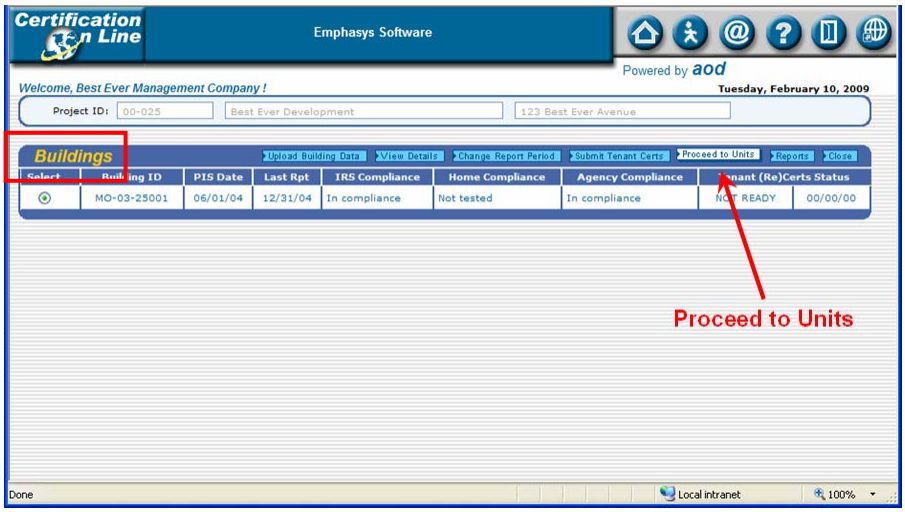
d. **Submit Tenant Certs –** This button will be discussed later in Section 6-H.

e. **Proceed to Units –** This button will be discussed later in Section 5.

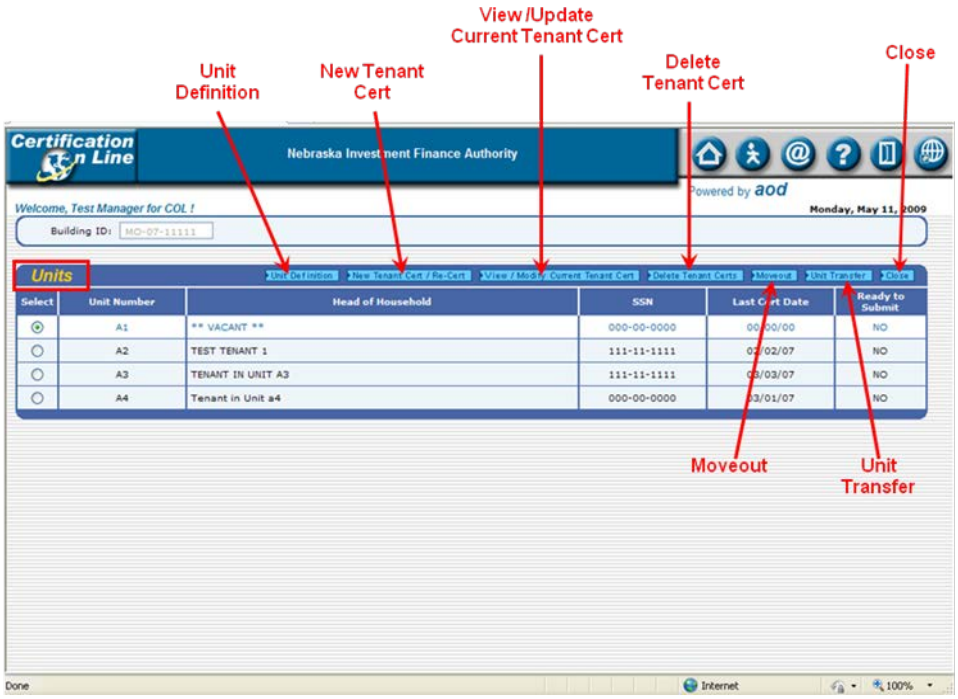
f. **Reports –** This button will be discussed later in Section 7.

6. *Units* Sub-Menu

- To access the ***Units*** sub-menu, click on the "**Proceed to Units**' button on the ***Buildings*** sub-menu bar.

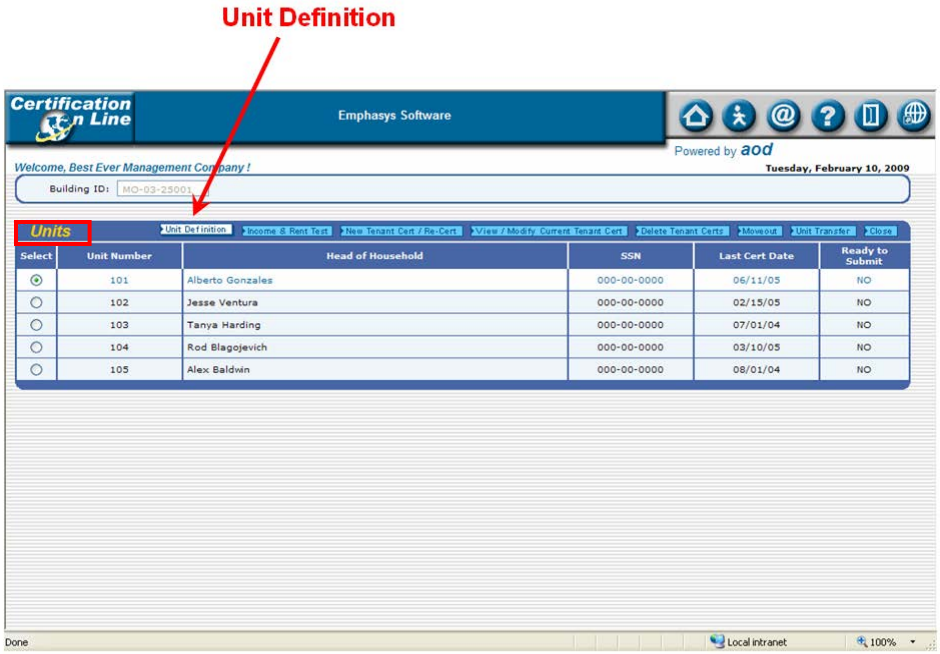


- You will be taken to the ***Units*** sub-menu. All of the units in the selected building are listed here. The units are displayed in order by unit number.

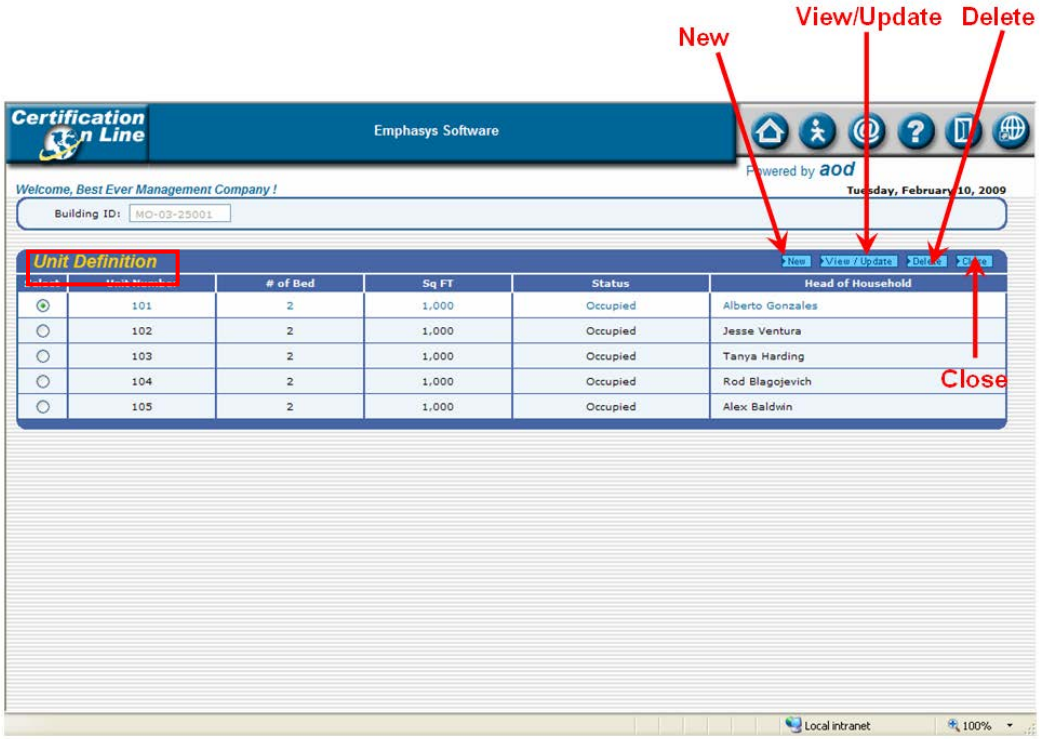


- At the top of the ***Units*** sub-menu are eight buttons:
  a. **Unit Definition**;
  b. **New Tenant Cert/Recert**;
  c. **View/Modify Current Tenant Cert**;
  d. **Delete Tenant Cert**
  e. **Move out;**
  f. **Unit Transfer; and**
  g. **Close**

A. Unit Definition



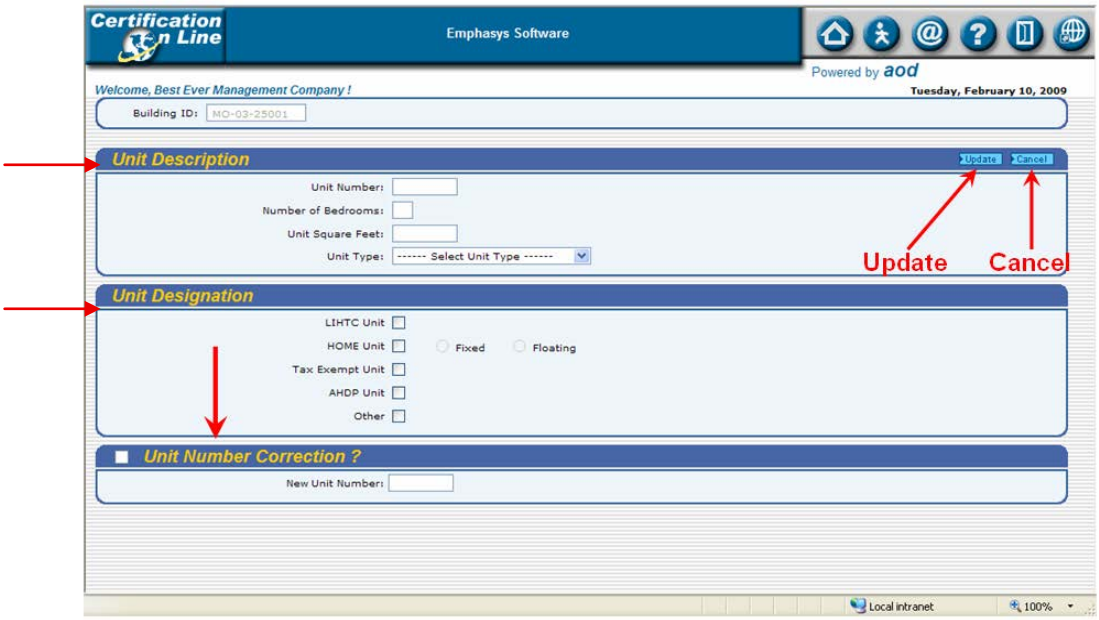
- The **Unit Definition** screen gives you a detailed look at the units in the building. First click next to the correct unit. Then click on the **Unit Definition** button.



- At the top right hand corner of the ***Unit Definition*** box are four buttons:
  1. **New**;
  2. **View/Update**;
  3. **Delete**; and
  4. **Close**

1. Create a New Unit

- To create a **new** unit, click on the **New** button.



- Create the unit by entering information in both the Unit Description box and the Unit Designation box.

- To enter the information, click on the white boxes. You can use the **Tab** key in addition to your mouse to move through the page.

- To choose a Unit Type, click on the down arrow to display the list. Highlight the unit type.

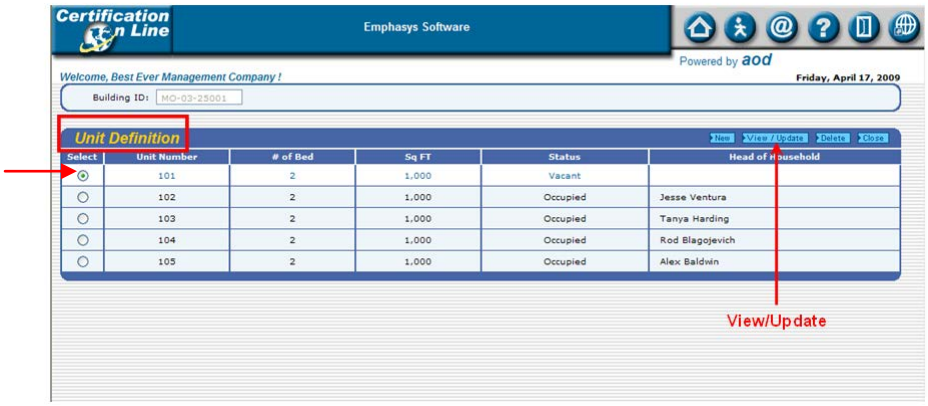
- Select one or more Unit Designations, as appropriate. Click on the box next to the appropriate designation(s). Click on the box next to each restriction the unit could **ever** have, not just the current restriction. For example, if the property has restrictions for LIHTC, HOME and Other (Other is for any restriction not identified), click on the boxes next to that name. For HOME, also identify if this is a fixed or floating unit.

- Click on the blue **Update** button to save the information or on the **Cancel** button to reject any changes.

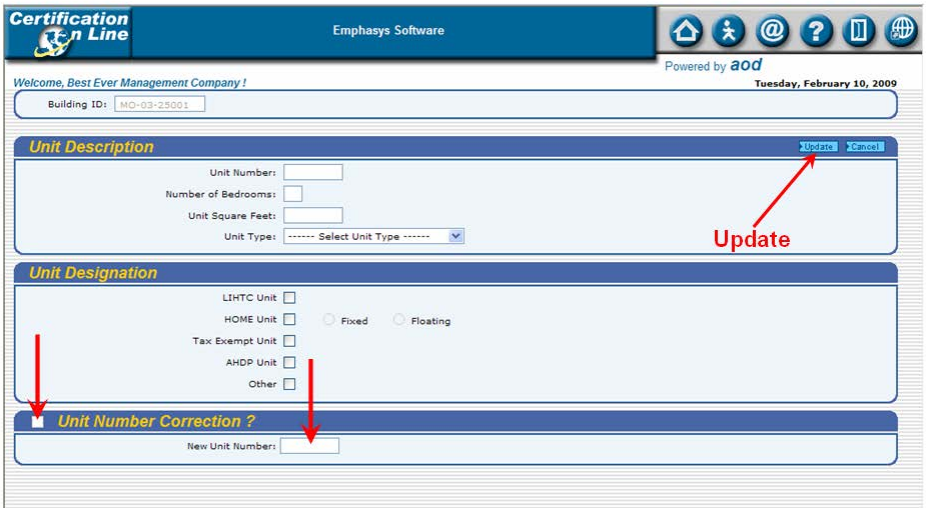
2. Update Existing Unit

- To make changes to an **existing** unit, click on the circle next to the correct unit.

- Click on the **View/Update** button.



- The information can be changed in either the Unit Description box and/or the Unit Designation box.



- To change the information, click on the white boxes next to the item. You can use the **Tab** key in addition to your mouse to move through the page.

- To choose a Unit Type, click on the down arrow to display the list. Highlight the unit type.

- Select one or more Unit Designations, as appropriate. Click on the box next to the appropriate designation(s). Click on the box next to each restriction the unit could **ever** have, not just the current restriction. For example, if the property has restrictions for LIHTC, HOME and Other (Other is for any restriction not identified), click on the boxes next to that name. For HOME, also identify if this is a fixed or floating unit.

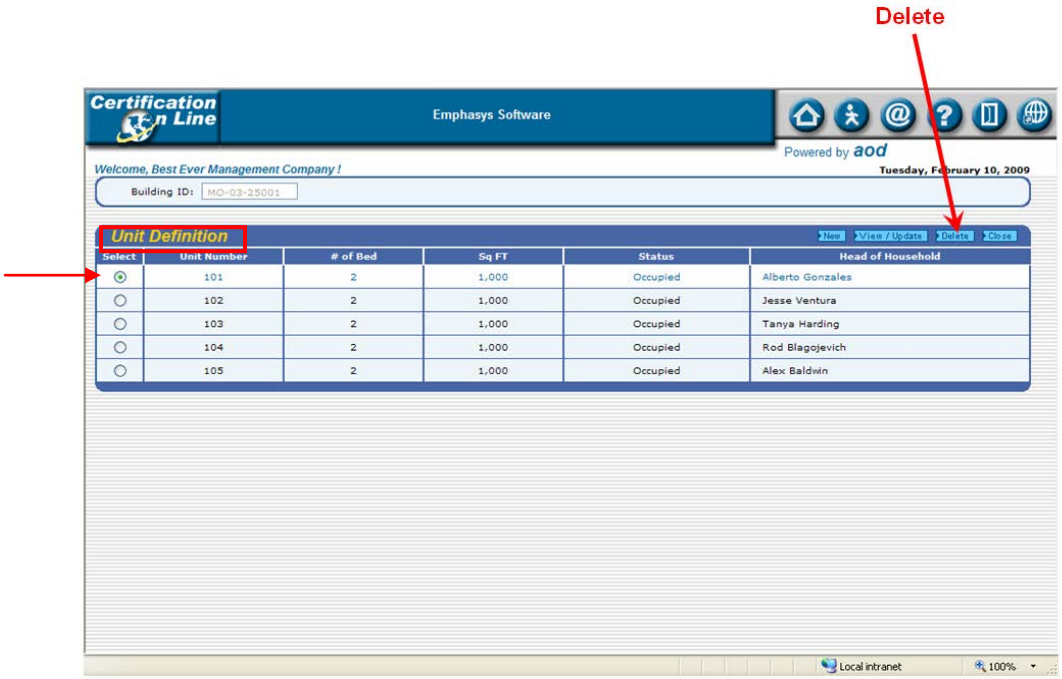
- If the unit number is incorrect, click on the white box next to Unit Number Correction.

- Enter the **new** unit number.

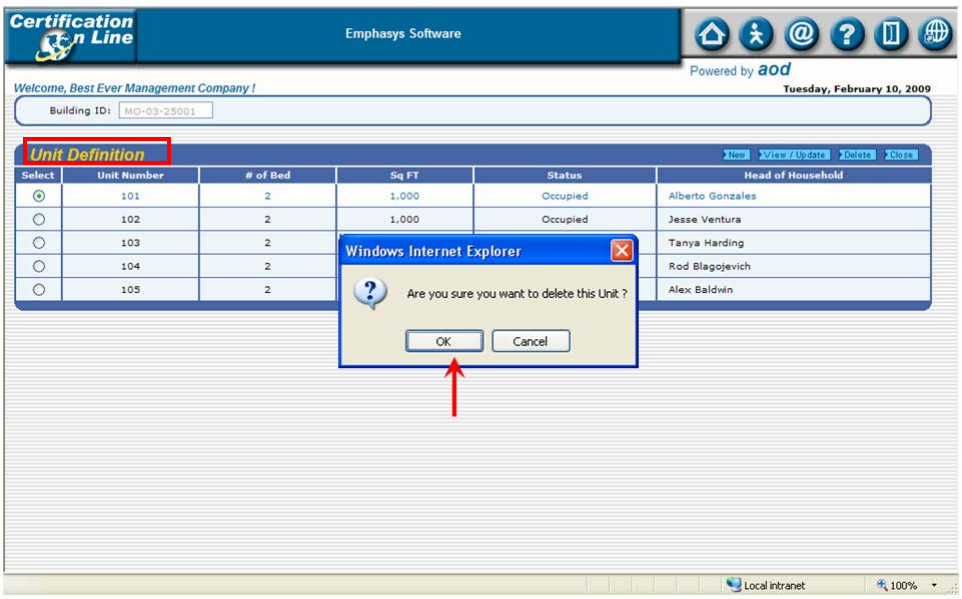
- Click on the blue **Update** button.

3. Delete a Unit

- To delete an existing unit, click on the circle next to the unit number.



- Click on the '**Delete**' button.



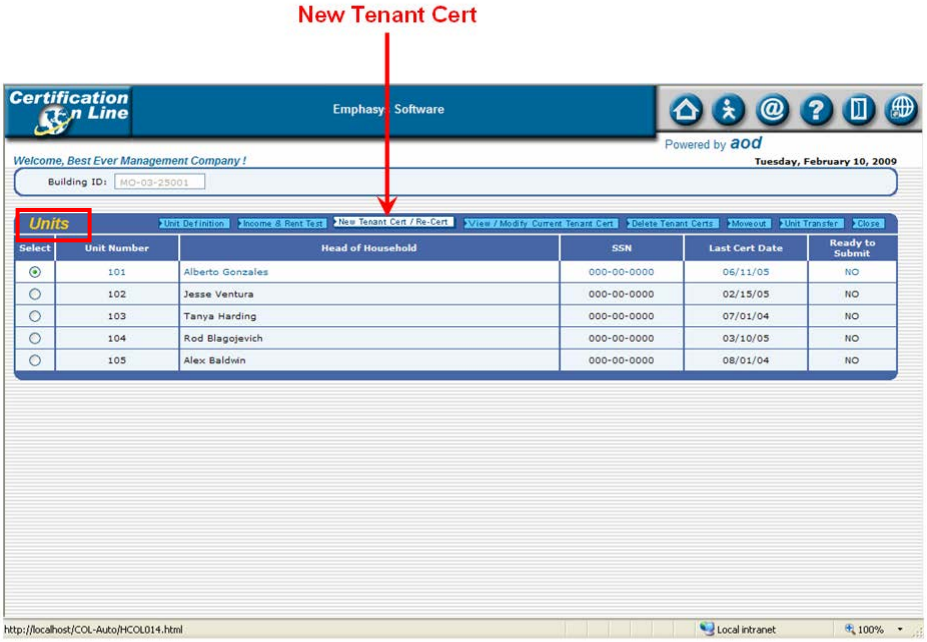
- You will be asked to confirm the deletion. If yes, click on the **OK** button. If no, click on the **Cancel** button.

- **Be sure this is what you want to do before clicking OK. The unit and any tenant history cannot be retrieved after it is deleted.**

7. Tenant Processes

A. New Certifications and Recertifications

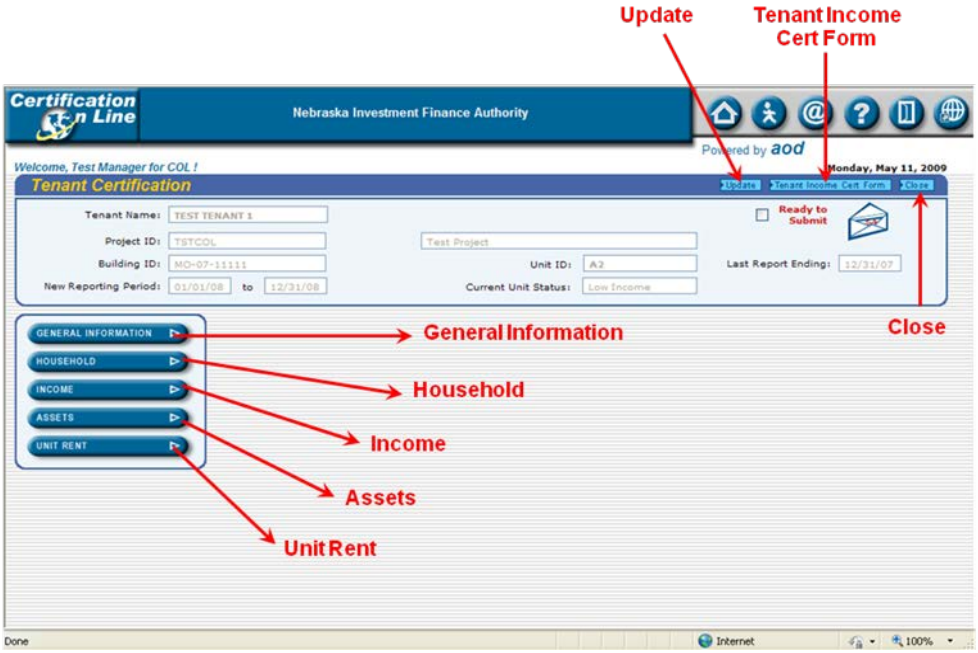
- To process a new tenant certification, **both for a new tenant and to recertify an existing tenant**, click on the **New Tenant Cert** button.



- This will take you to the Tenant Certification screen.

- At the top right hand corner of the Tenant Certification box are four buttons:

  1. **Update**;
  2. **Tenant Income Cert form** – This button will be discussed in B below; and
  3. **Close**



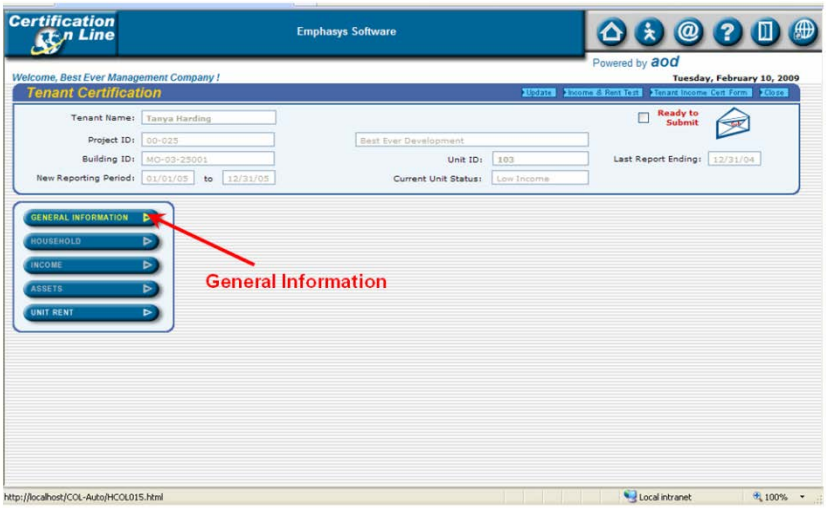
- If the white boxes next to New Reporting Period are blank, enter the beginning and ending dates of the reporting period that you are working with. You need enter only the numbers without any separating marks. For example, 010109 will then be converted to 01/01/2009.

- On the left hand side of the screen, under the Tenant Certification box is another box that contains five blue bars:

  A-1. **General Information**;
  A-2. **Household;**
  A-3. **Income;**
  A-4. **Assets;** and
  A-5. **Unit Rent.**

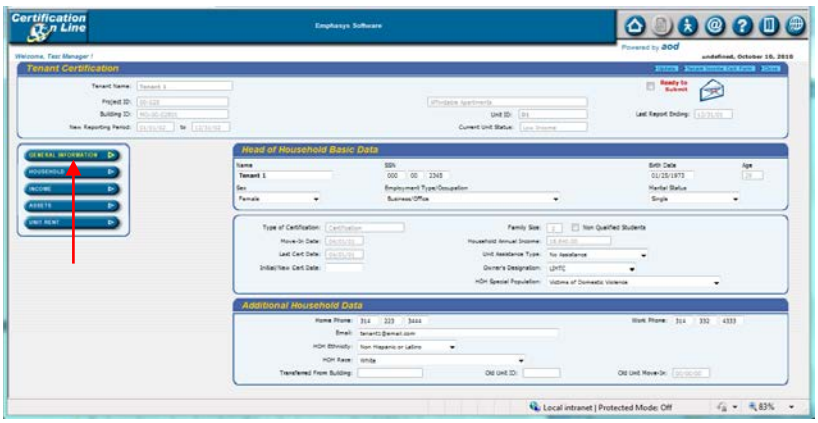
A-1. Head of Household Information

- Click on the first blue bar, 'General Information'.



- This will take you to the Head of Household Basic Data screen. This screen contains three boxes:

  1. Head of Household Basic Data;
  2. Head of Household Basic Data 2; and
  3. Additional Household Data



- To enter the information, click on the white boxes. You can use the **Tab** key in addition to your mouse to move through the page.

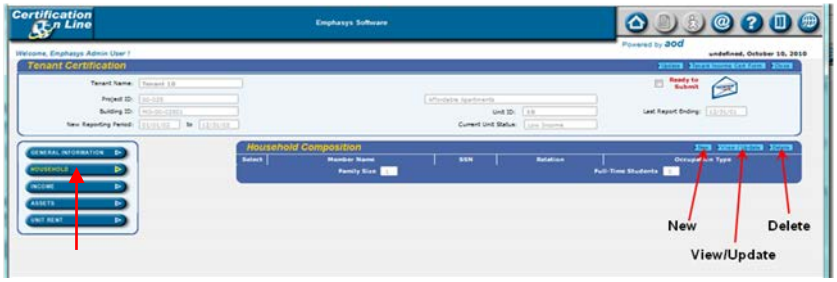
- To choose from a drop down box, click on the down arrow, then highlight the answer.

- When complete, click on the **Update** button.

- **Please Note:** Some boxes (Type of Certification, Last Certification and Family Size) are grayed out and will not allow you to enter data. These boxes will be populated with information from other screens

A-2. Household

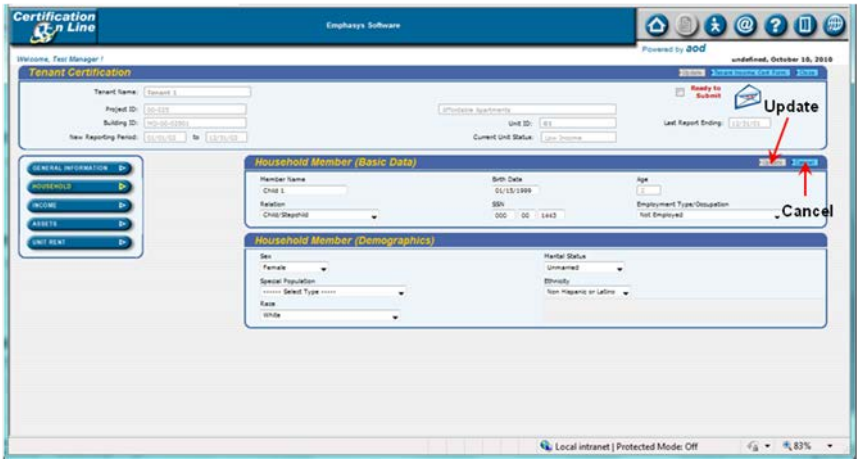
- Click on the second blue bar **Household**.



- This will open the Household Composition Toolbar. There are three buttons on the toolbar:
  1. **New**;
  2. **View/Update**; and
  3. **Delete.**

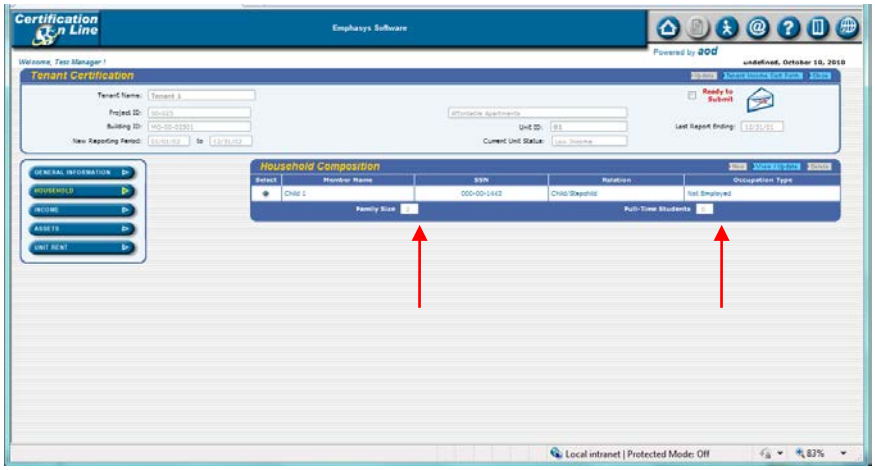
1. Add a New Household Member

- To add a **new** household member, click on the **New** button.



- To enter the information, click on the white boxes. You can use the **Tab** key in addition to your mouse to move through the boxes.

- Click on the blue **Update** button.

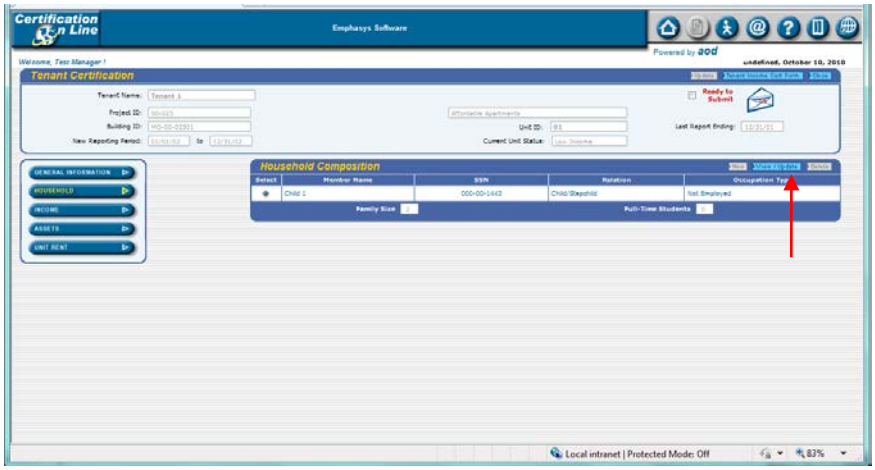


- Each additional household member is displayed on the Household Composition toolbar as they are entered and the total number of household members shown in the white box, 'Family Size'.

- If there are full-time students in the unit, the number shows in the white box, 'Full-Time Students'.

2. Update Household Member

- To make changes to an **existing** household member click on the circle next to the correct member then click on the **View/Update** button.

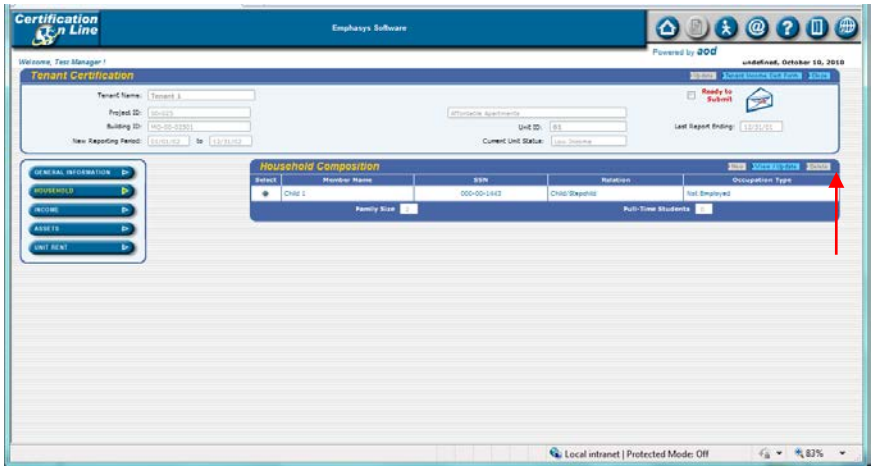


- To change the information, click on the white boxes containing the information. You can use the **Tab** key in addition to your mouse to move through the page.

- Click on the blue **Update** button.

3. Delete a Household Member

- To delete an existing household member, click on the circle next to the correct member then click on the **Delete** button.



- You will be asked to confirm the deletion. If yes, click on the **OK** button. If no, click on the **Cancel** button.

- **Be sure this is what you want to do before clicking OK. The household member cannot be retrieved after it is deleted.**

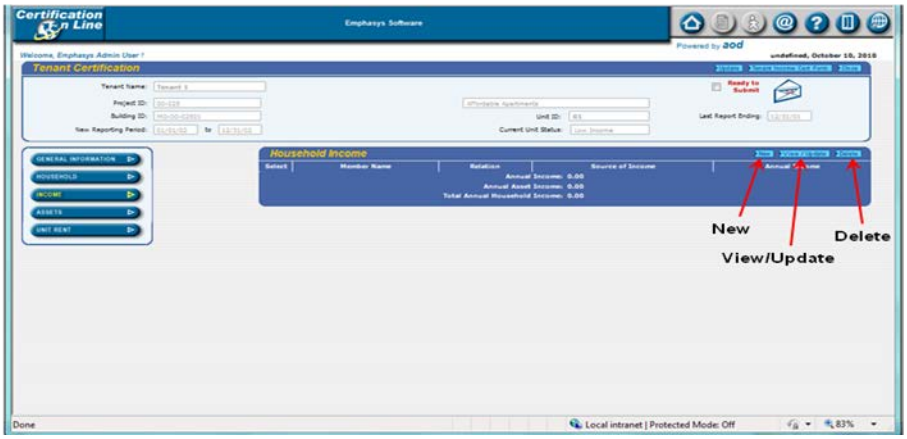
- To exit the Household section, click on one of the other blue bars or the Update button at the top of the Tenant Certification screen.

A-3. Income

- Click on the third blue bar **Income.**

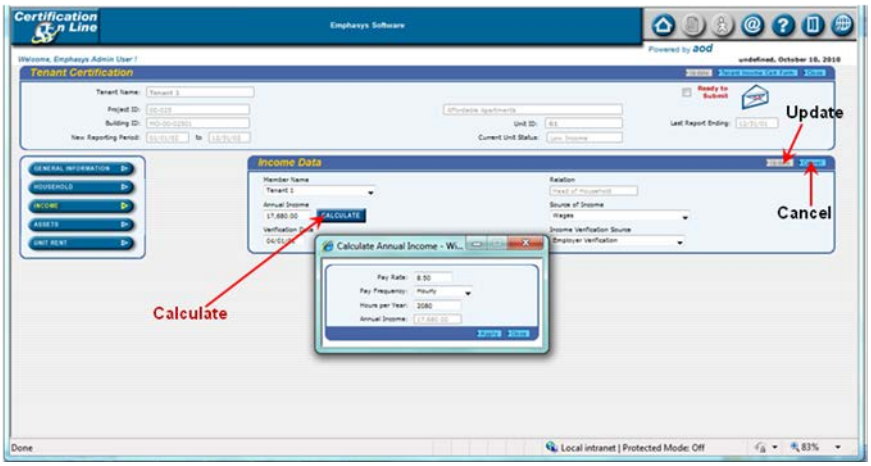
- This will open the Household Income Toolbar. There are three buttons on the toolbar:

1. **New**;
2. **View/Update**; and
3. **Delete.**



1. Add a New Source of Income

- To add a **new** source of income, click on the **New** button.

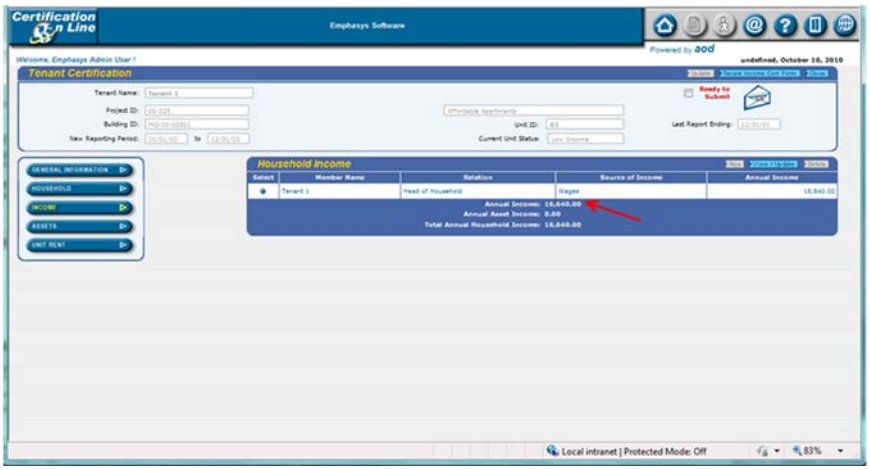


- To enter the information, click on the white boxes. You can use the **Tab** key in addition to your mouse to move through the boxes.

- The Annual Income can be entered or calculated.

- The blue '**Calculate**' button opens up a window to assist you in the calculation of annual income.
  A. Click on the white boxes to enter the specifics of the wages.
  B. Click on the down arrow to open a list of different pay frequencies. Highlight to choose the frequency and click.
  C. When the "Pay Rate" is hourly the "Hours per year" defaults to 2080 (full time hours) but can be changed.
  D. When the information is complete, click on the blue '**Apply**' button to enter the number into the 'Annual Income' box.

- Click on the blue **Update** button.

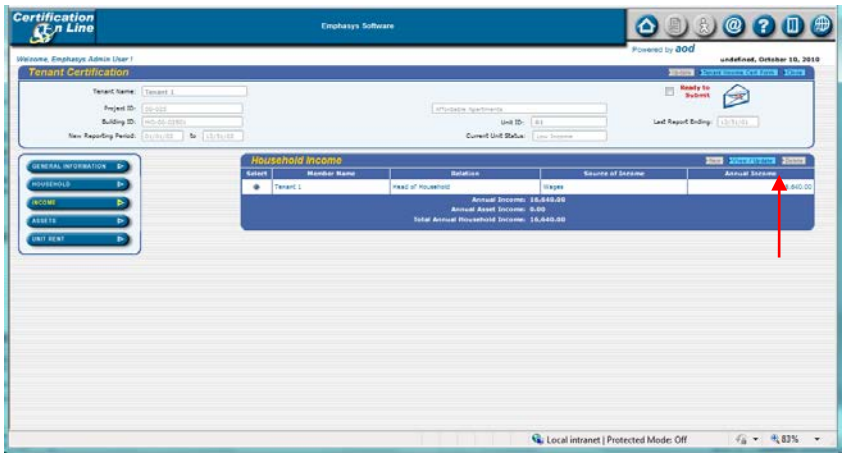


- Each income entry is displayed on the Household Income toolbar as they are entered and the total Annual Income is shown.

- **Please Note: When a recertification is done, if the source of income is the same, do not enter it again. This will cause the income to be counted twice. Use View/Update to update the existing source of income with the new amount and verification information.**

2. Update Source of Income

- To make changes to an **existing** source of income click on the circle next to the correct member then click on the **View/Update** button.

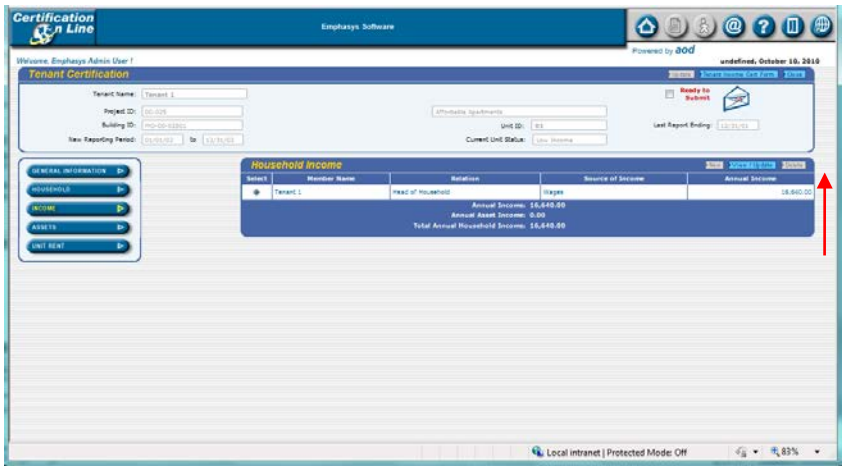


- To change the information, click on the white boxes containing the information. You can use the **Tab** key in addition to your mouse to move through the page.

- Click on the blue **Update** button.

3. Delete a Source of Income

- To delete an existing source of income, click on the circle next to the correct member then click on the **Delete** button.



- You will be asked to confirm the deletion. If yes, click on the **OK** button. If no, click on the **Cancel** button.

- **Be sure this is what you want to do before clicking OK. The source of income cannot be retrieved after it is deleted.**

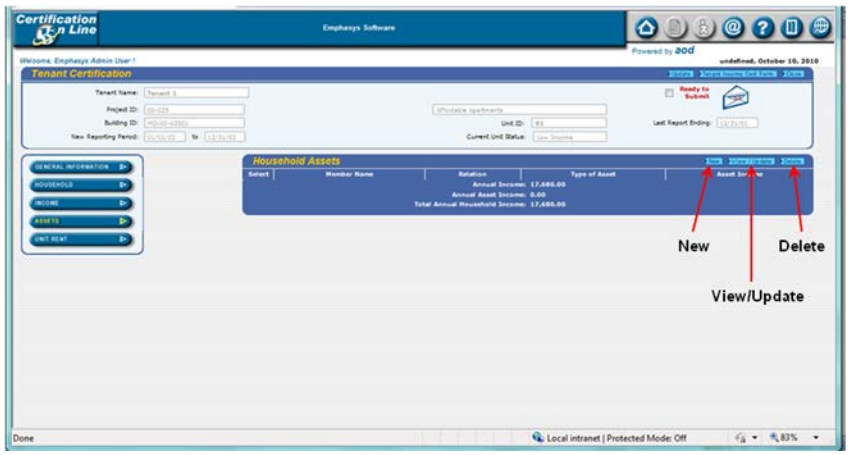
- To exit the Income section, click on one of the other blue bars or the Update button at the top of the Tenant Certification screen.

A-4. Assets

- Click on the fourth blue bar **Assets.**

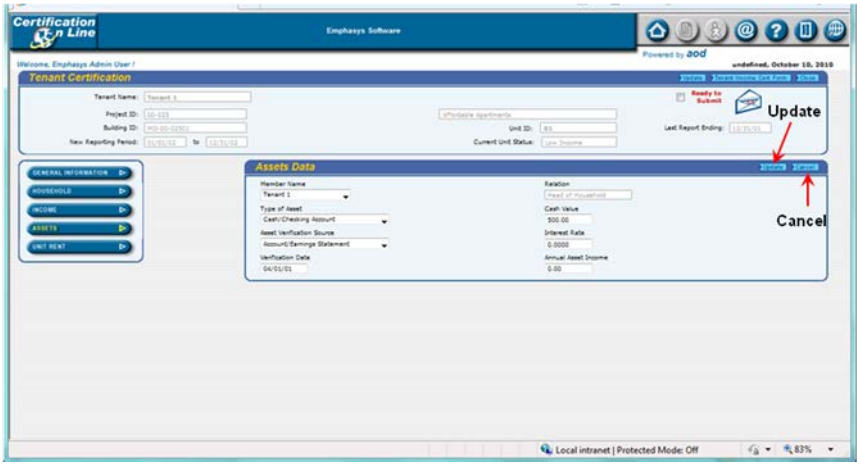
- This will open the Household Assets Toolbar. There are three buttons on the toolbar:

  1. **New**;
  2. **View/Update**; and
  3. **Delete.**



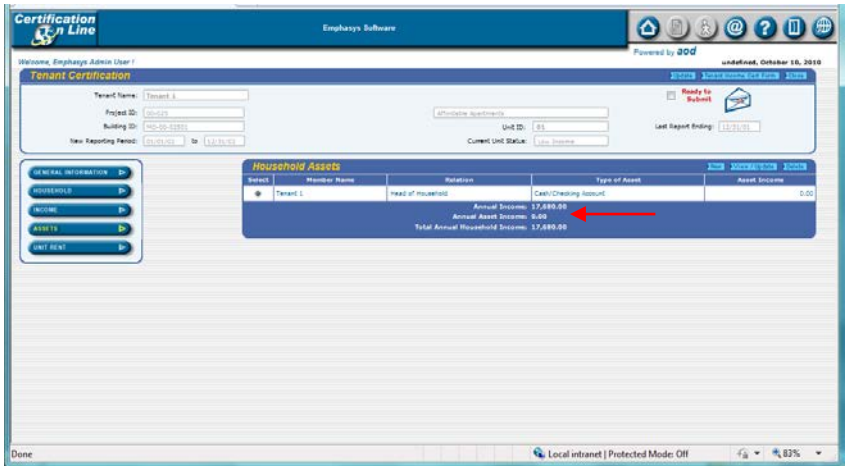
1. Add a New Asset

- To add a **new** asset, click on the **New** button.



- To enter the information, click on the white boxes. You can use the **Tab** key in addition to your mouse to move through the boxes.

- Click on the blue **Update** button.

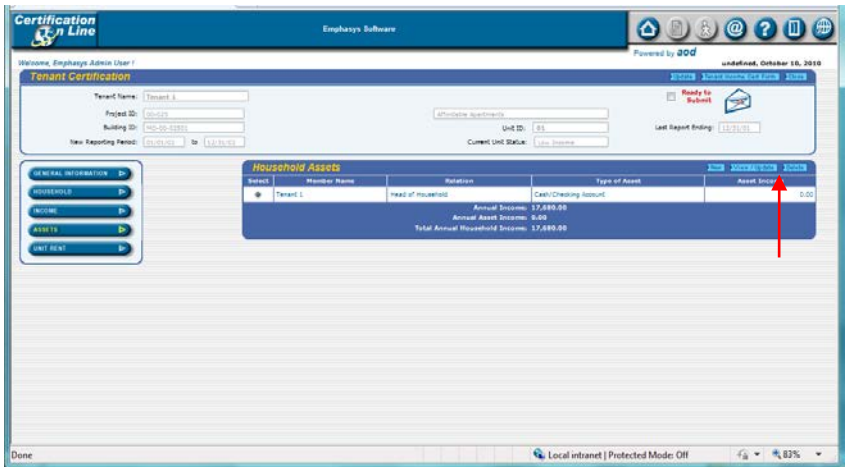


- Each asset entry is displayed on the Household Assets toolbar as they are entered and the total Annual Asset Income is shown.

- **Please Note: The Household Assets toolbar will display the larger of the actual interest entered and the HUD imputed interest calculation.**

2. Update an Asset

- To make changes to an **existing** asset click on the circle next to the correct member then click on the **View/Update** button.

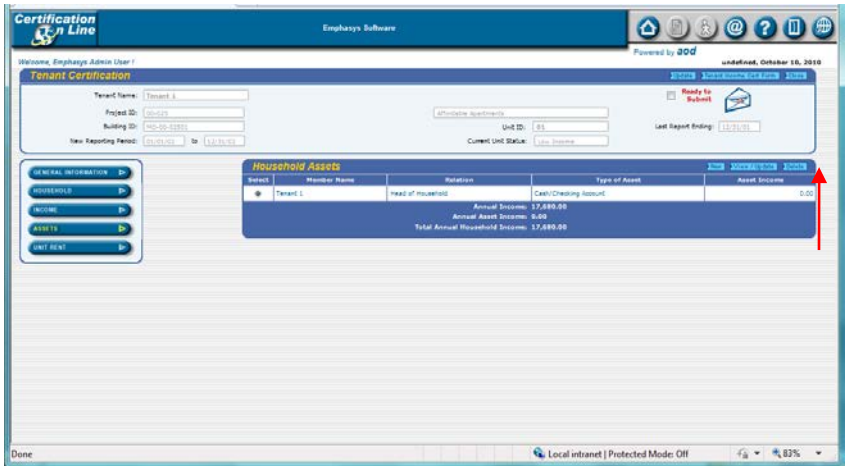


- To change the information, click on the white boxes containing the information. You can use the **Tab** key in addition to your mouse to move through the page.

- Click on the blue **Update** button.

3. Delete an Asset

- To delete an existing asset, click on the circle next to the correct member then click on the **Delete** button.



- You will be asked to confirm the deletion. If yes, click on the **OK** button. If no, click on the **Cancel** button.

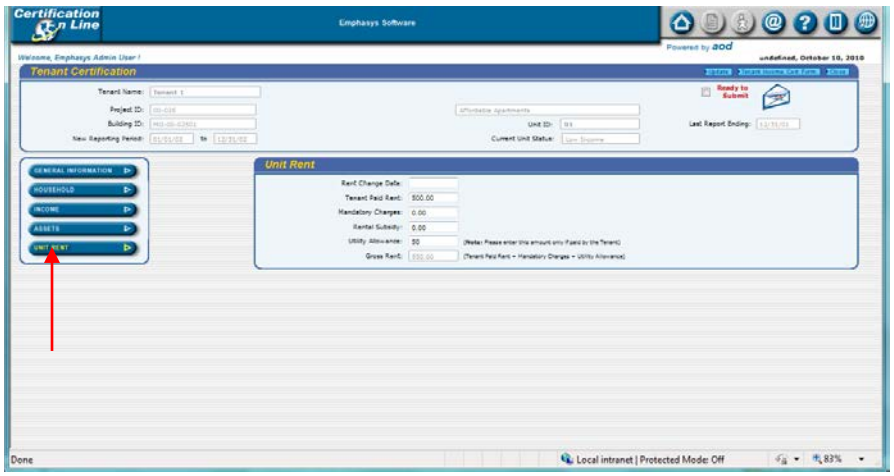
- **Be sure this is what you want to do before clicking OK. The asset cannot be retrieved after it is deleted.**

- To exit the Asset section, click on one of the other blue bars or the Update button at the top of the Tenant Certification screen.

A-5. Unit Rent

- Click on the fifth blue bar **Unit Rent**.

- This will take you to the Unit Rent screen. The different components of Gross Rent are listed here.



- To enter the information, click on the white boxes. You can use the **Tab** key in addition to your mouse to move through the page.

- <u>Rent Change Date</u>: If the rent for the unit is changed at a time **<u>other than the time of certification</u>**, enter that date here, <u>otherwise, leave it blank</u>.

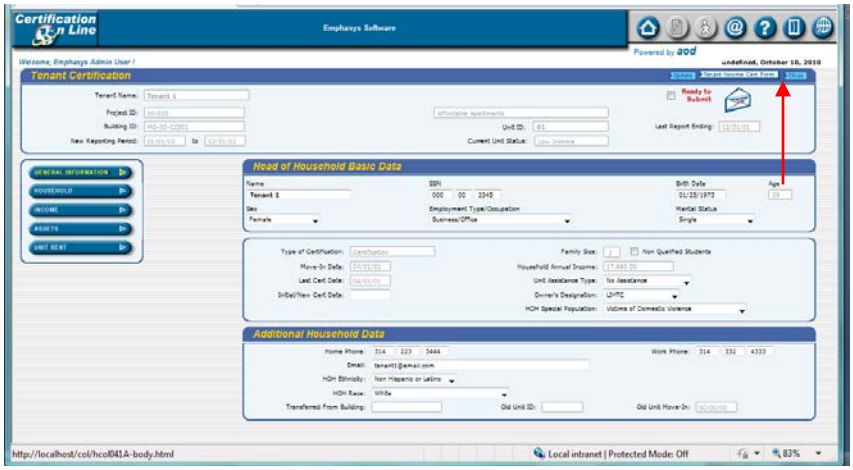
PLEASE NOTE: **Projects that have received a Certification Waiver: Since the tenants will not be certified again after the first or second year, that date will not change. So <u>every time the rent is changed</u>, the date of the rent change must be entered in the <u>Rent Change Date field.</u>**

- <u>Mandatory Charges</u>: Any cost, other than rent and utilities that is **required to be paid** as a condition to occupy the unit.

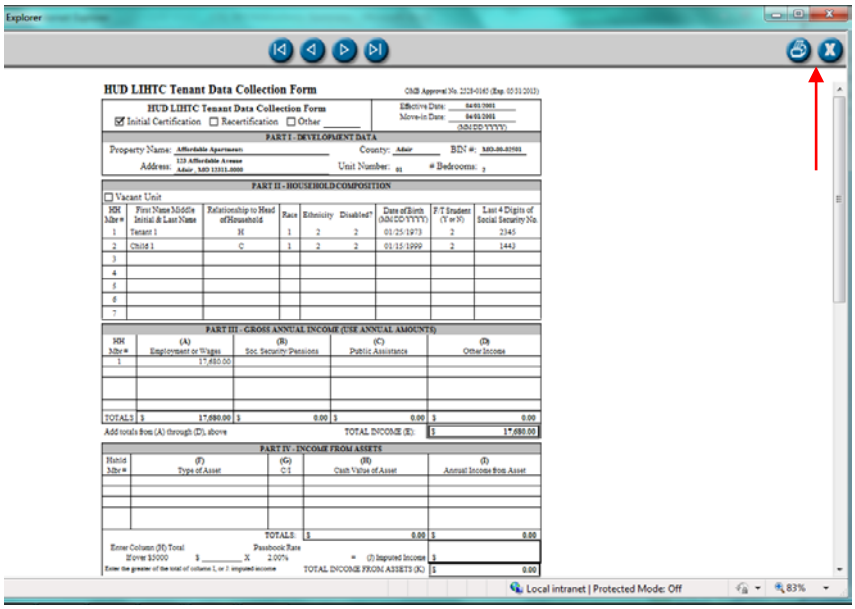
- When complete, click on Update button at the top of the Tenant Certification screen. That will save all of the tenant information entered and will return you be taken back to the ***Units*** sub-menu.

B. Printing the Tenant Income Certification form

- The completed Tenant Income Certification form can now be printed. To print the form, click on the **Tenant Income Cert Form** button.

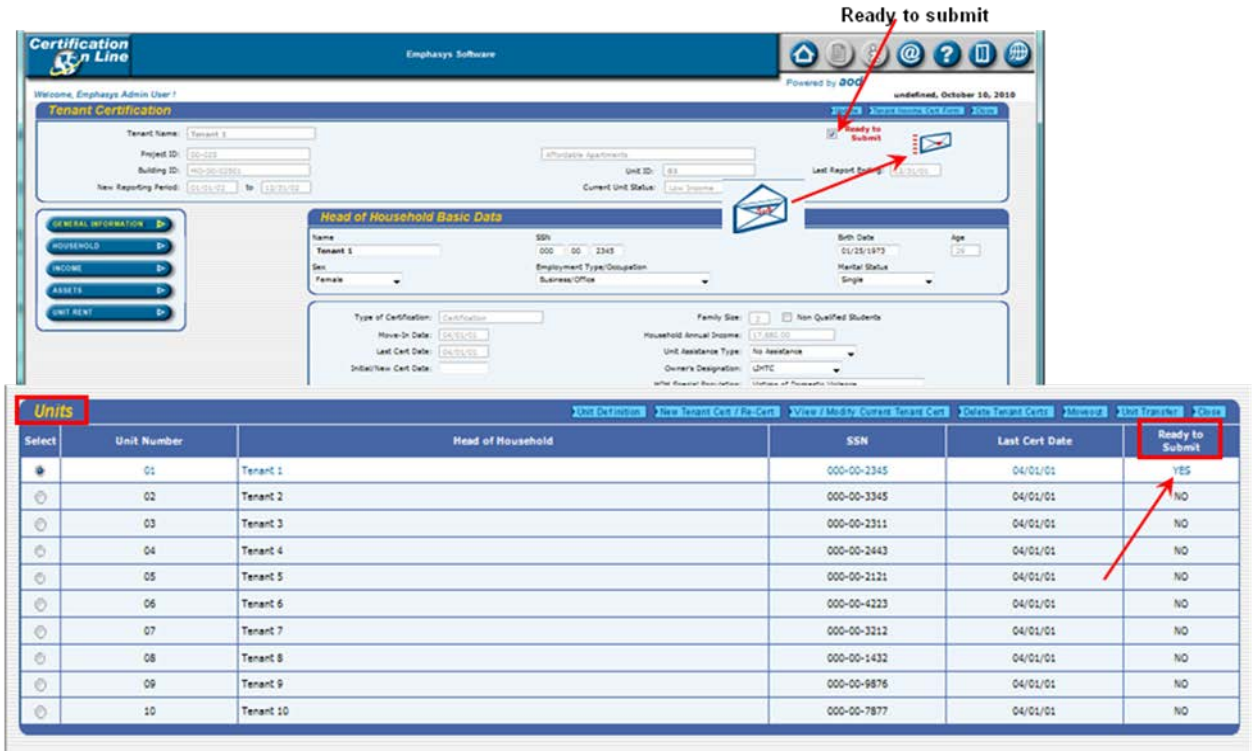


- The completed Tenant Income Certification form is displayed in a view window for review. If the form is correct, click on the button in the upper right hand corner of the window.



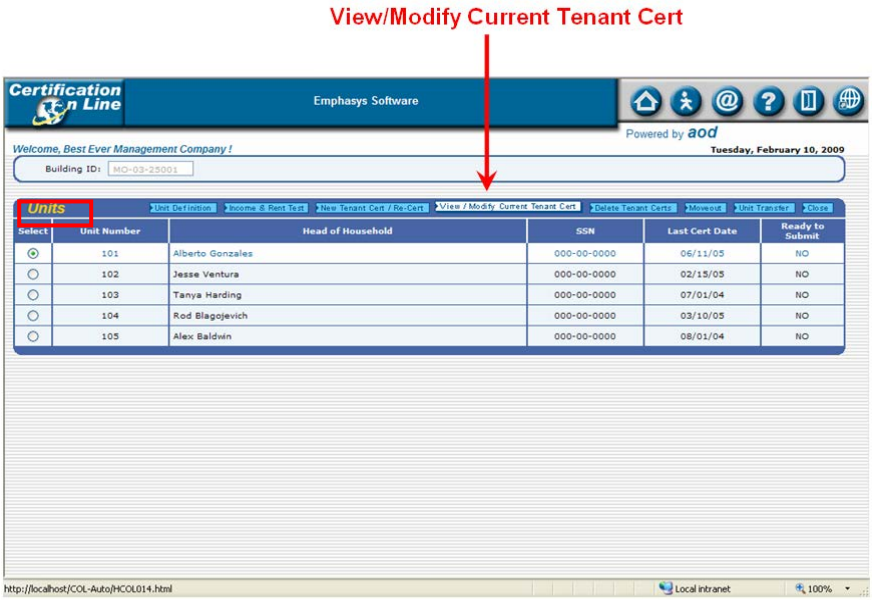
C. Mark Unit as Ready to Submit

- This resident certification is now complete. Each unit must be checked as Ready to Submit before a building can be sent to the Agency.
- To mark the unit as complete, click on the white box next to the '**Ready to Submit**' box.
- The open envelope image will change to a closed envelope.
- To exit this screen, click on the blue '**Update**' button.
- On the ***Units*** sub-menu, at the right hand side, there is a 'Ready for Submission' column. This unit now displays 'Yes'.

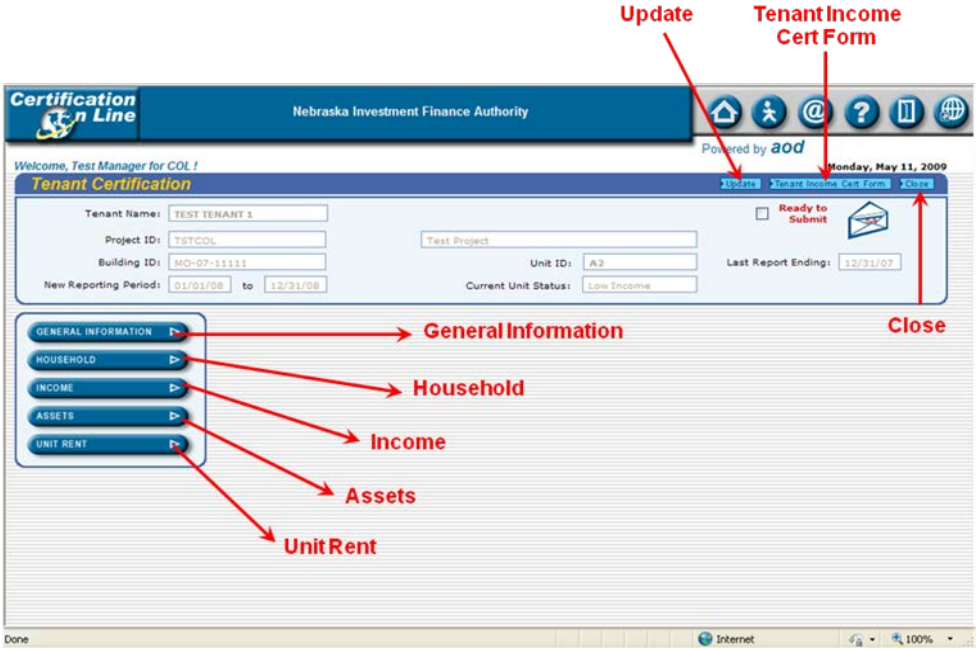


D. View or Modify Current Certification

- To view or update a certification for an existing resident, click on the '**View/Modify Current Tenant Cert**' button.



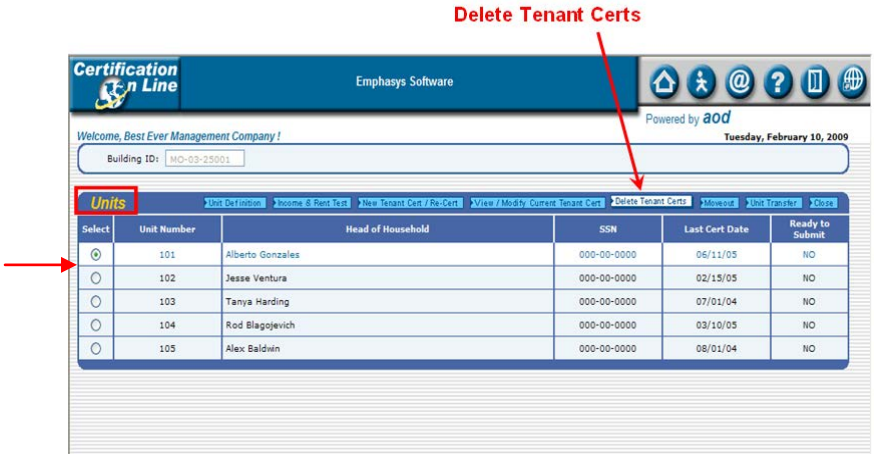
- This process allows you to view and/or update information for an existing resident. The screens are the same as those used to process a new certification or recertification.



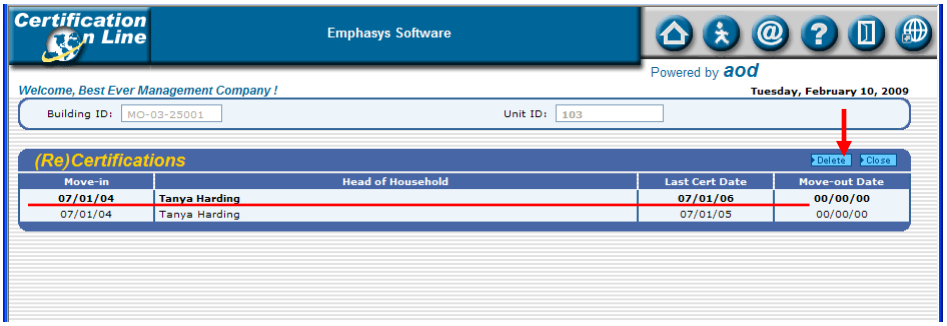
PLEASE NOTE: <u>Re-</u>certifications for existing residents must be processed using the 'New Tenant Cert' button.

E. Delete a Tenant Certification

- To choose the unit, click on the circle next to the unit number.



- To delete a tenant certification, click on the '**Delete Tenant Cert**' button.

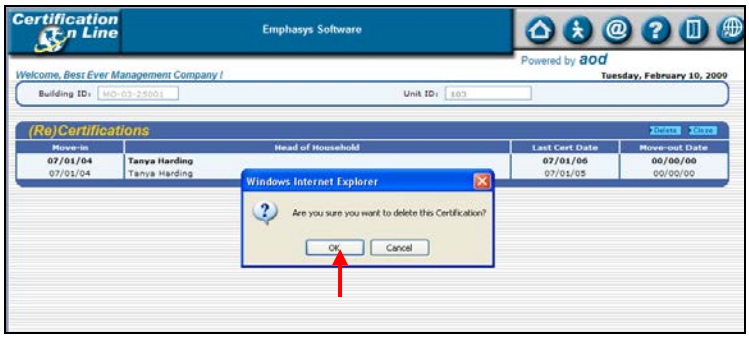


- Only resident certifications in the <u>current reporting period</u> can be deleted.

- A list of certifications for the resident is displayed. The certifications in the current reporting period are **darker**. Choose the certification you want to delete by placing the cursor on the desired entry.

- To delete the selected entry, click on the '**Delete**' button at the right hand corner of the (Re)Certifications box.

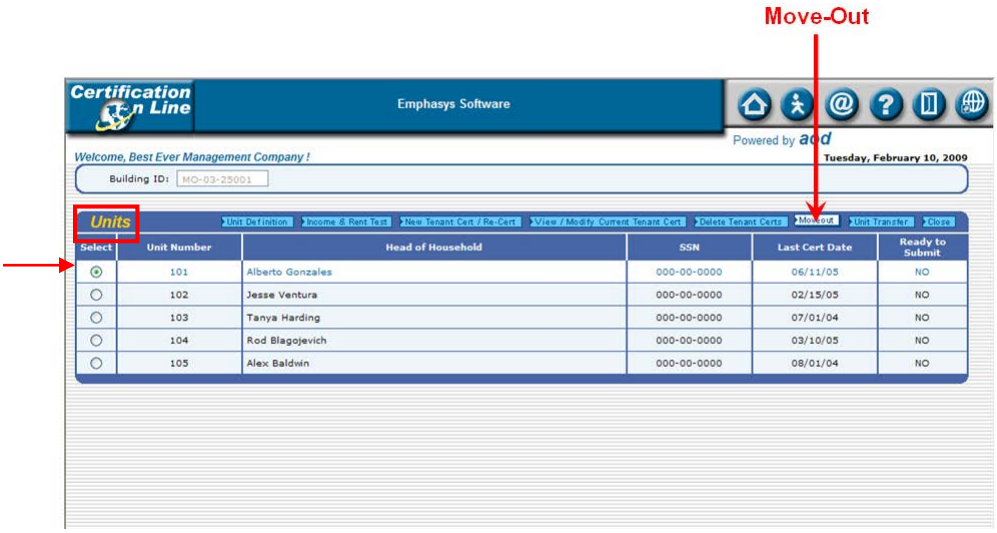
- You will be asked, "Are you sure you want to delete this certification? If yes, click on the '**OK**' button. If no, click on the '**Cancel**' button.



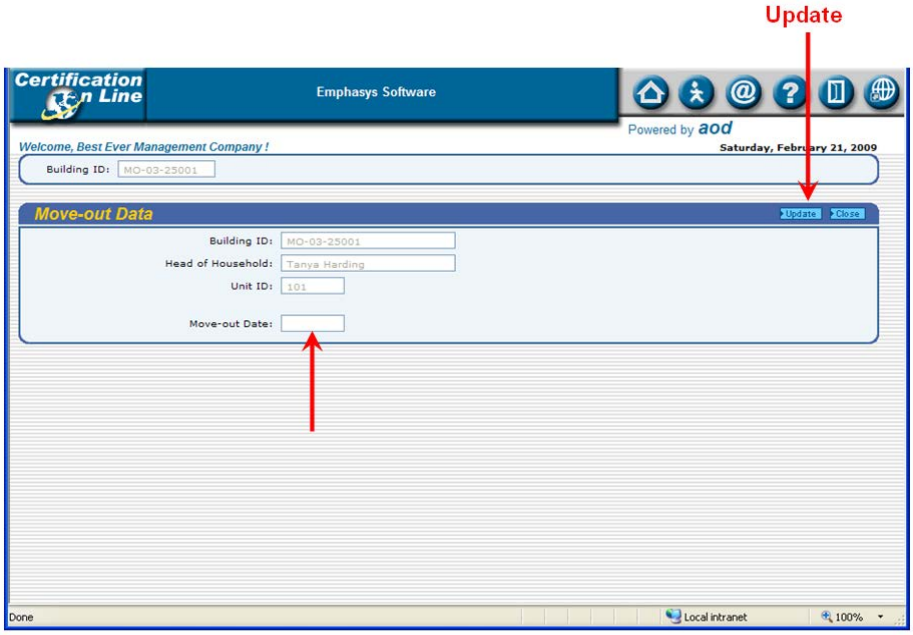
- **Be sure this is what you want to do before clicking 'OK'. The certification cannot be retrieved after it is deleted.**

F. Move out a Resident

- To choose the unit to work with, click on the circle next to the unit number.



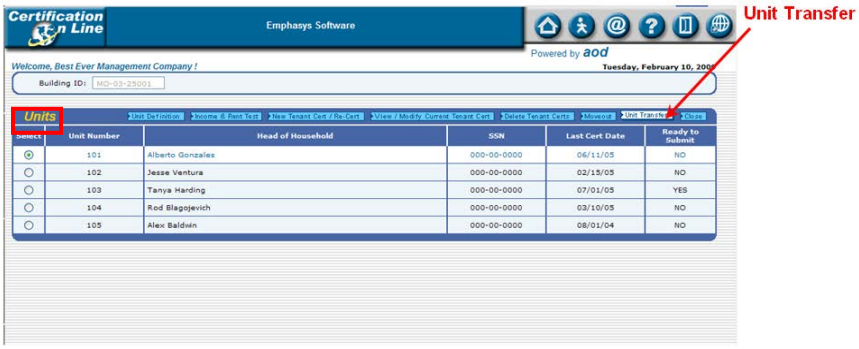
- To move-out an existing resident, click on the '**Move-Out**' button.
- A blue box, 'Move-out Data', will open.



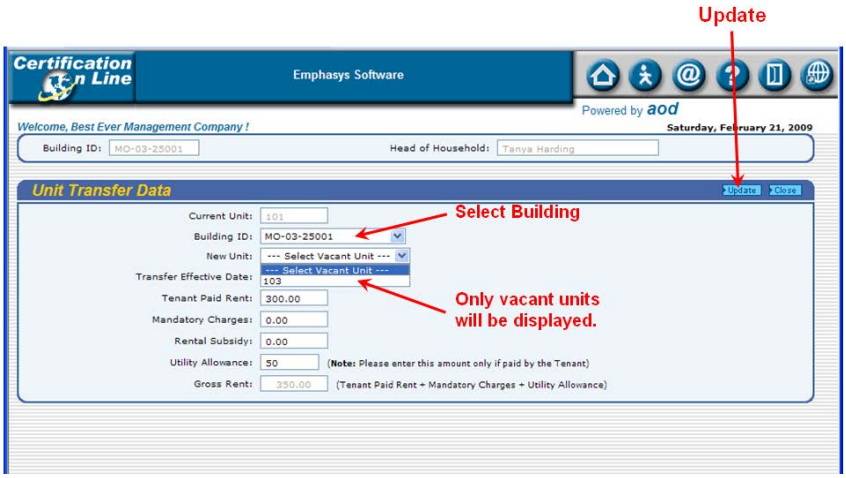
- To enter the information, click on the white boxes.
- When complete, click on the '**Update**' button.

G. Unit Transfer

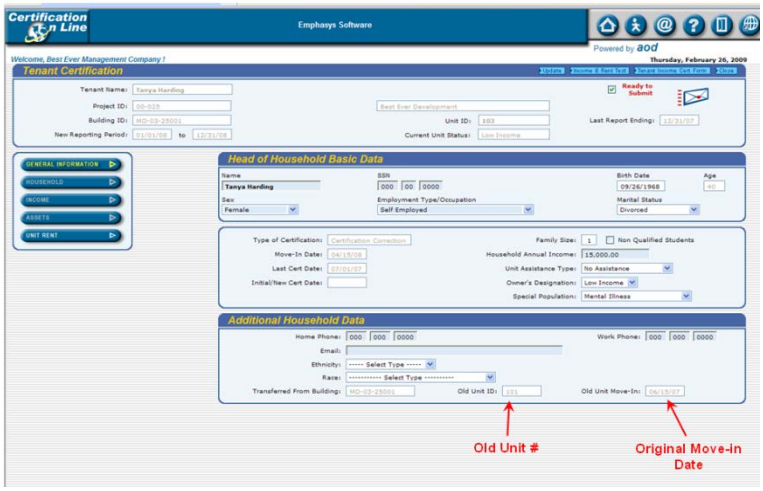
- To choose the unit to work with, click on the circle next to the unit number.



- To transfer an existing resident to another unit, click on the '**Unit Transfer**' button.
- A blue box, 'Unit Transfer Data', will open.
- To enter the information, click on the white boxes. You can use the 'Tab' key in addition to your mouse to move through the page.



- When complete, click on the '**Update**' button.

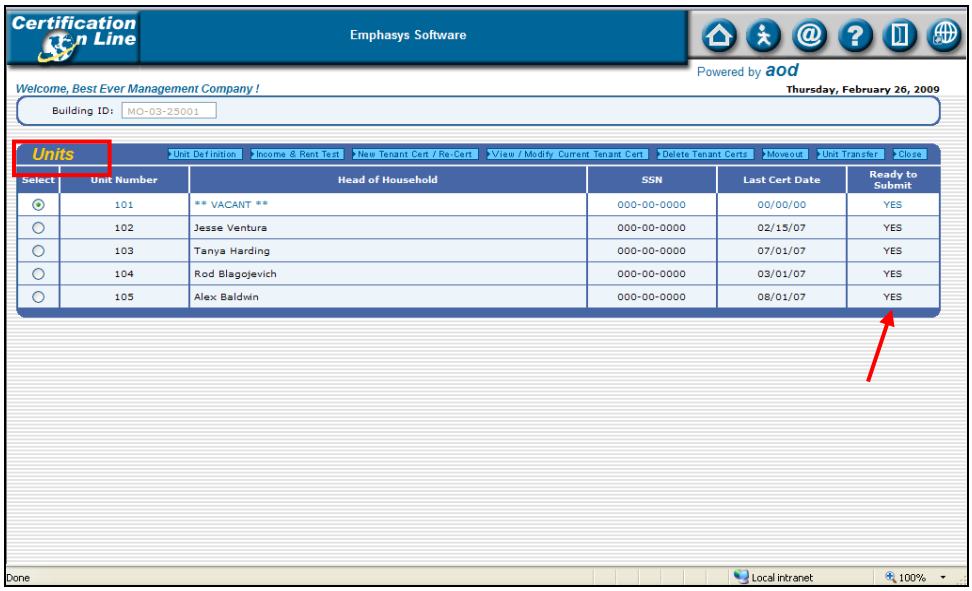


- The original move-date and unit number is displayed under Additional Household Data of the new unit

H. Submission of Occupancy Data

PLEASE NOTE: Only the Management Company can submit Tenant Certifications.

- On the ***Units*** sub-menu, you can easily track which units are ready for submission. At the right hand side of the Units box, the 'Ready for Submission' column shows either 'Yes' or 'No'.

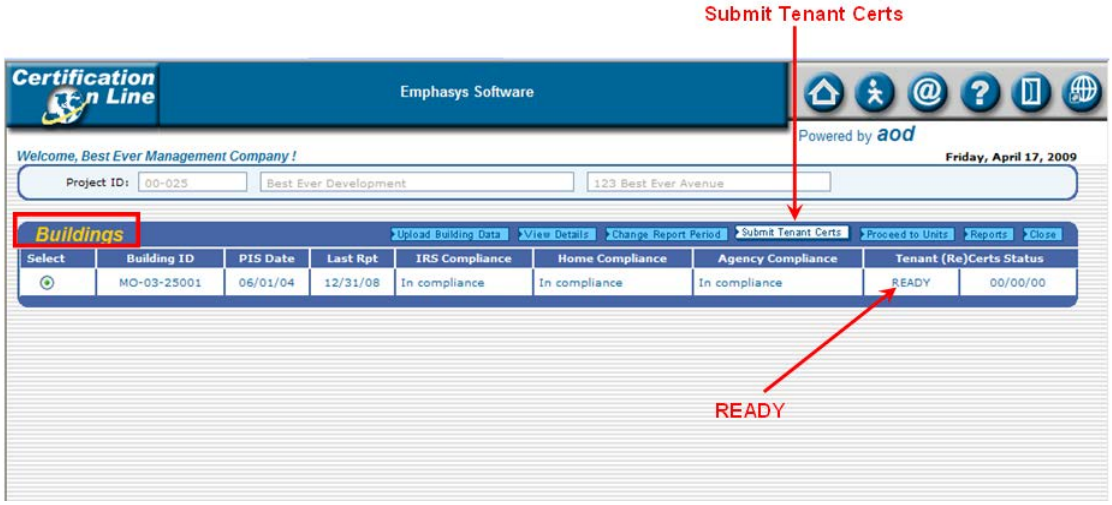


- To return to the ***Buildings*** sub-menu click on the '**Close**' button.

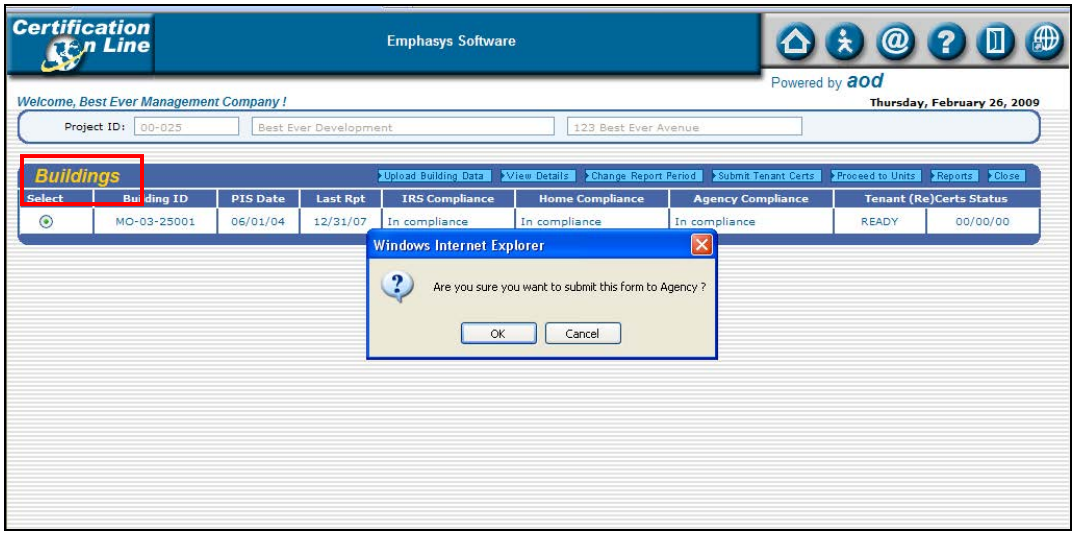
- All units must be complete before a building can be submitted t0 the Agency.

- When all of the units in the building are complete, the first box in the 'Tenant (re)Cert Status column will display 'Ready'. This building is now ready to submit.

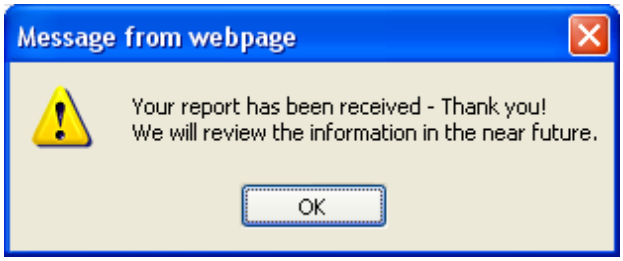
- To submit the Occupancy Data for the building, click on the '**Submit Tenant Certs**' button.



- A pop-up box will ask if you are sure you to want to submit to the Agency. If you are ready, click on the '**OK**' button. If you are not ready, click on the '**Cance**l' button.

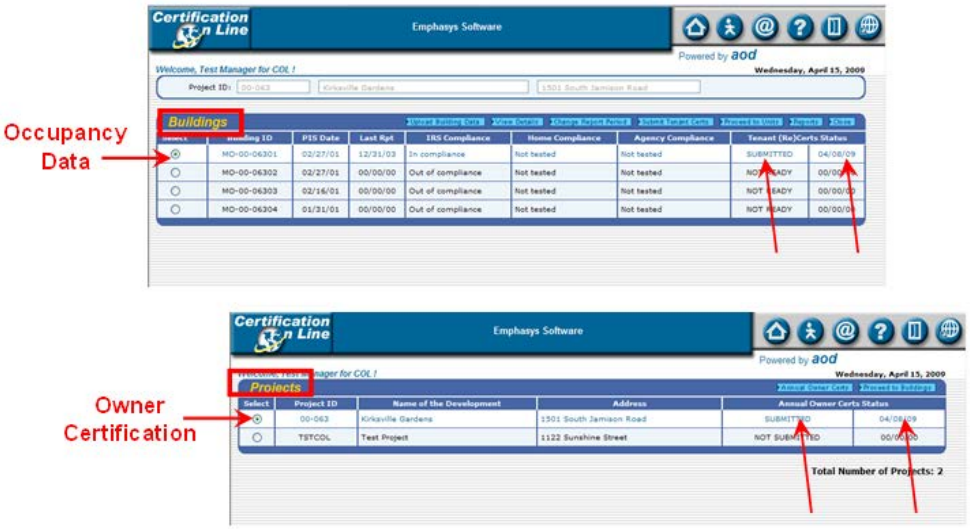


- After the 'OK' is clicked, a pop-up box will confirm that the report has been received by the Agency.



- Once the building is submitted, the 'Tenant (Re)Cert Status boxes will display 'Submitted' and the date.

- Both the ***Buildings*** sub-menu and the ***Projects*** menu display 'Submitted' and the date.

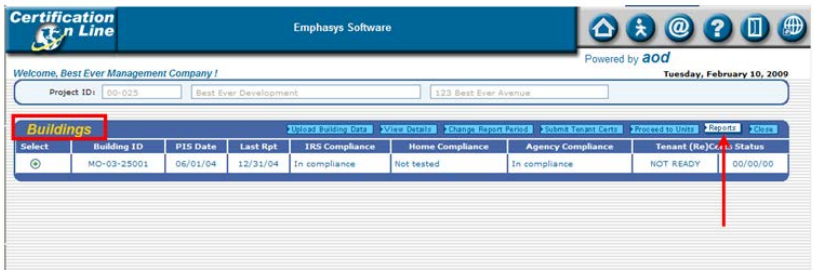


- This project is complete for this reporting period.

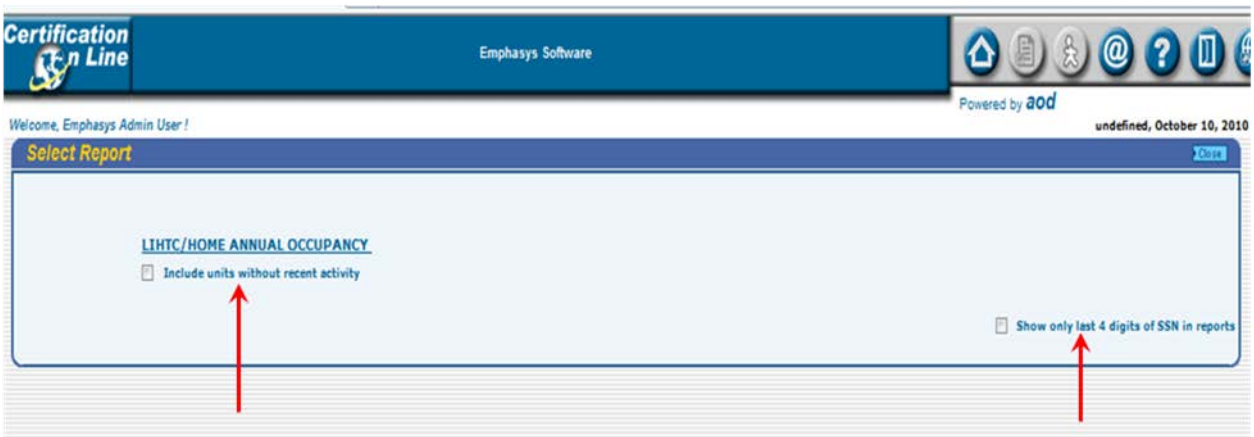
- Please use the '**Log Out**' icon to log-out of the system.

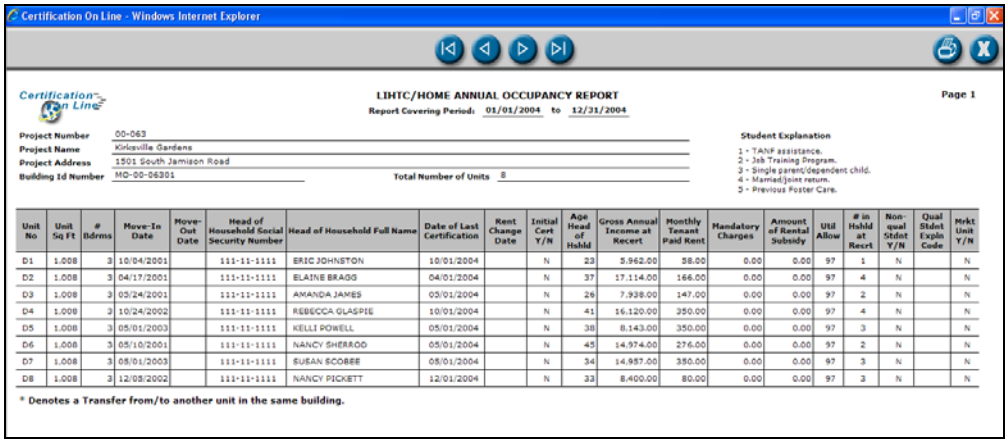
8. Reports

- There is one report in Certification On-Line. To access the reports, click on the '**Reports**' button.



- The LIHTC Annual Occupancy Report provides the ability to print the tenant activity for the current reporting period.





Unit No	Unit Sq Ft	# Bdrms	Move-In Date	Move-Out Date	Head of Household Social Security Number	Head of Household Full Name	Date of Last Certification	Rent Change Date	Initial Cert Y/N	Age Head of Hshld	Gross Annual Income at Recert	Monthly Tenant Paid Rent	Mandatory Charges	Amount of Rental Subsidy	Util Allow	# in Hshld at Recrt	Non-qual Stdnt Y/N	Qual Stdnt Expln Code	Mrkt Unit Y/N
D1	1,008	3	10/04/2001		111-11-1111	ERIC JOHNSTON	10/01/2004		N	23	5,962.00	58.00	0.00	0.00	97	1	N		N
D2	1,008	3	04/17/2001		111-11-1111	ELAINE BRAGG	04/01/2004		N	37	17,114.00	166.00	0.00	0.00	97	4	N		N
D3	1,008	3	03/24/2001		111-11-1111	AMANDA JAMES	03/01/2004		N	26	7,938.00	147.00	0.00	0.00	97	2	N		N
D4	1,008	3	10/24/2002		111-11-1111	REBECCA GLASPIE	10/01/2004		N	41	16,120.00	350.00	0.00	0.00	97	4	N		N
D5	1,008	3	05/01/2003		111-11-1111	KELLI POWELL	05/01/2004		N	38	8,143.00	350.00	0.00	0.00	97	3	N		N
D6	1,008	3	05/10/2001		111-11-1111	NANCY SHERROD	05/01/2004		N	45	14,974.00	276.00	0.00	0.00	97	2	N		N
D7	1,008	3	08/01/2003		111-11-1111	SUSAN SCOBEE	08/01/2004		N	34	14,957.00	350.00	0.00	0.00	97	3	N		N
D8	1,008	3	12/03/2002		111-11-1111	NANCY PICKETT	12/01/2004		N	33	8,400.00	80.00	0.00	0.00	97	3	N		N

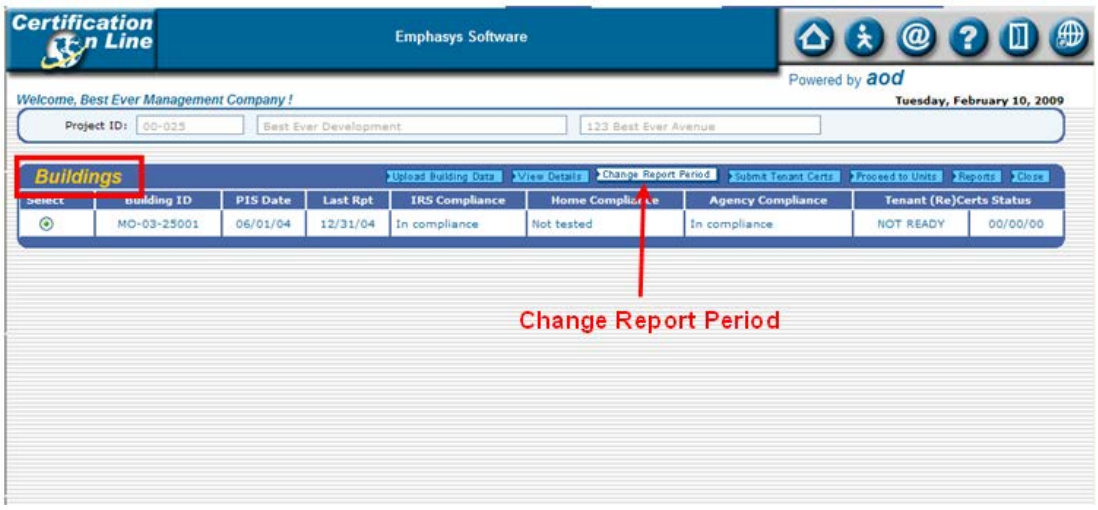
- The report will show only the units that have had activity since the end of the last reporting period. To include <u>all</u> of the units in the report click on the "Include units without recent activity" box.

- To display only the last 4 digits of the tenant social security number, click on the "Show only last 4 digits of SSN in reports" box.

9. Other Information

A. Change Report Period

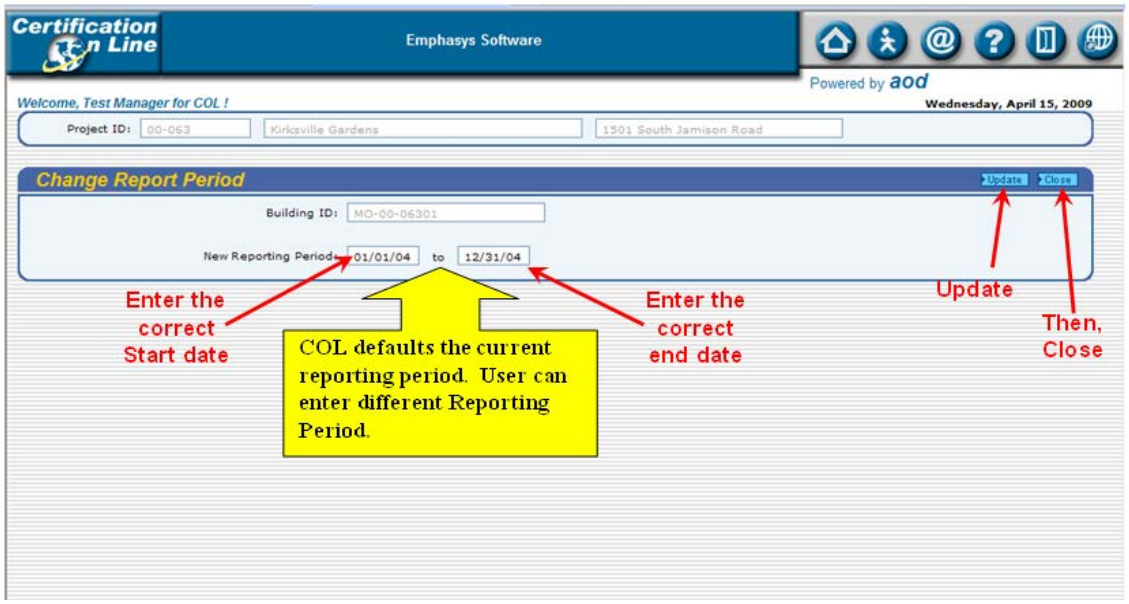
- If an incorrect reporting period is entered, it can be corrected. The Change Report Period process is accessed from the ***Buildings*** sub-menu. Click on the Change Report Period button.



- That will take you to the Change Report Period screen. The current reporting period is the default, but can be changed.

- To change the reporting period, click on the first date box.

- Enter the correct start date and hit the Tab key to move to the next box. Enter the correct ending date and click on the Update button.

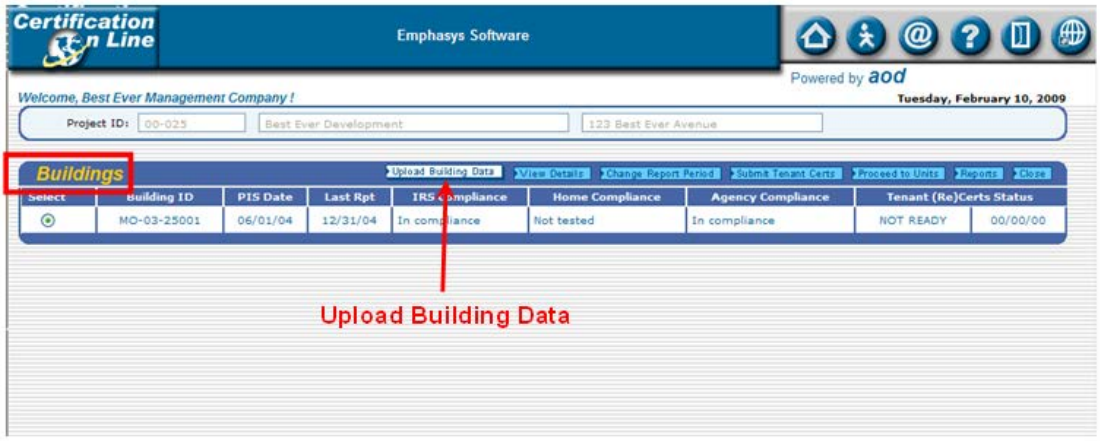


- Then click on the close box. You will be returned to the ***Buildings*** sub-menu.

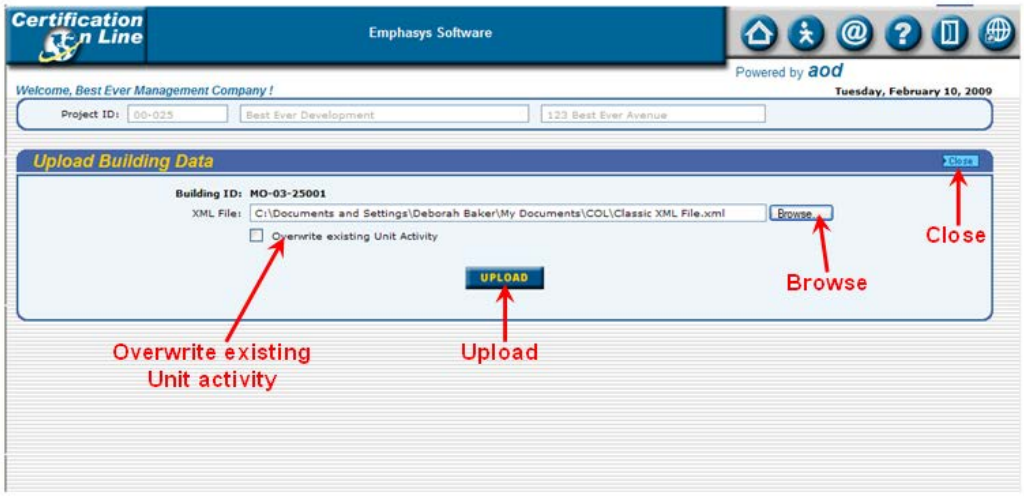
B. Upload Building Data

The 'Upload Building Data' process enables property managers that use property management software to transfer the tenant transaction data (move-ins, move-outs, (re)certifications and unit transfers) to the Certification On-Line reporting system.

- The Upload Building Data process is accessed from the ***Buildings*** sub-menu. Click on the Upload Building Data button.



- This will take you to the Upload Building Data Screen.

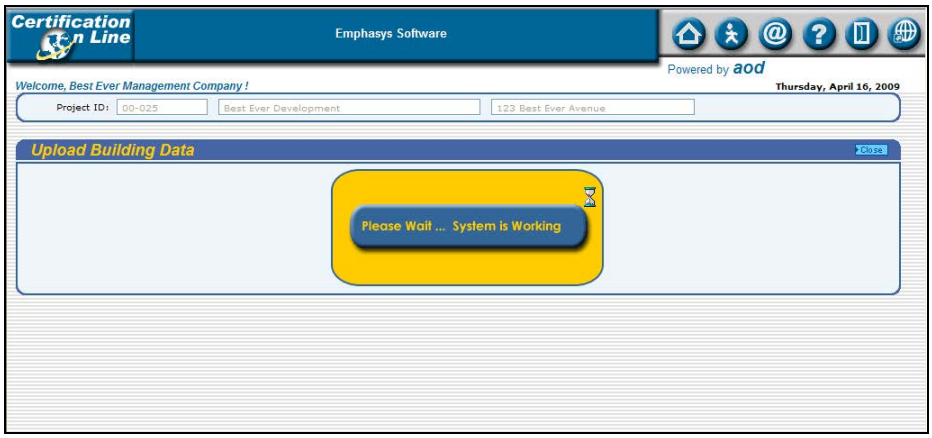


- Click on the Browse button. This opens your computer files directory. Locate the XML file that you want to upload and highlight the file. Then click on the Open button. The file path will show in the XML file window.

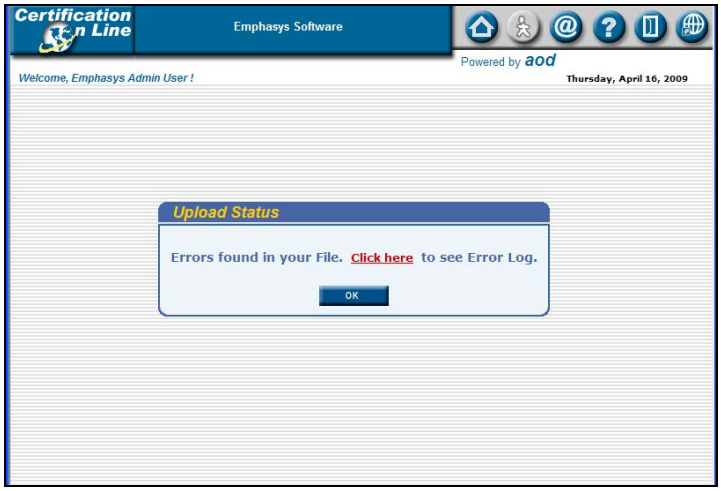
- You can overwrite existing data in COL and replace it with the new XML data. To activate this process, click on the Overwrite Existing Unit Activity box to place a check mark in the box.

- If you do not want to overwrite existing data, leave the Overwrite Existing Unit Activity box blank.

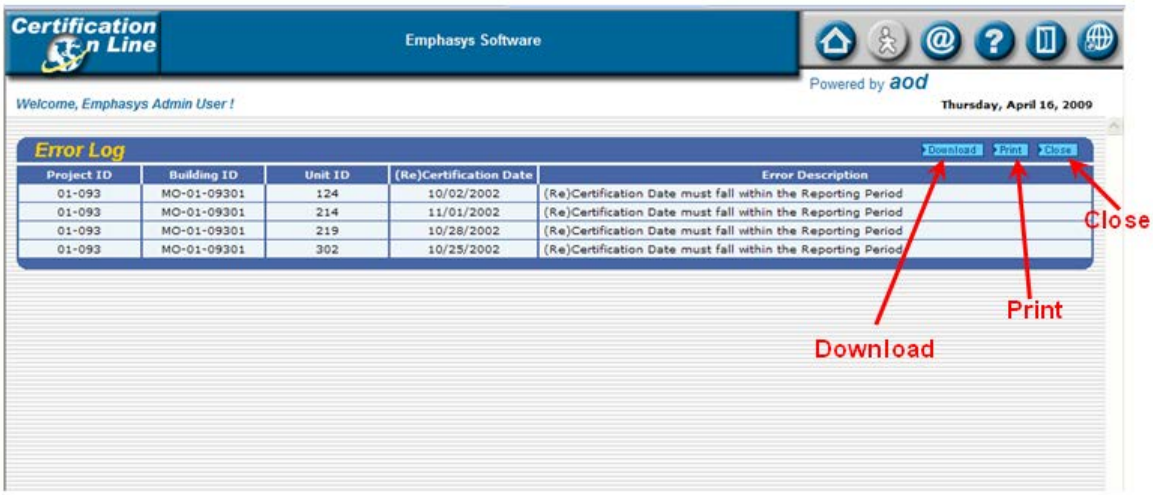
- Click on the Upload button.



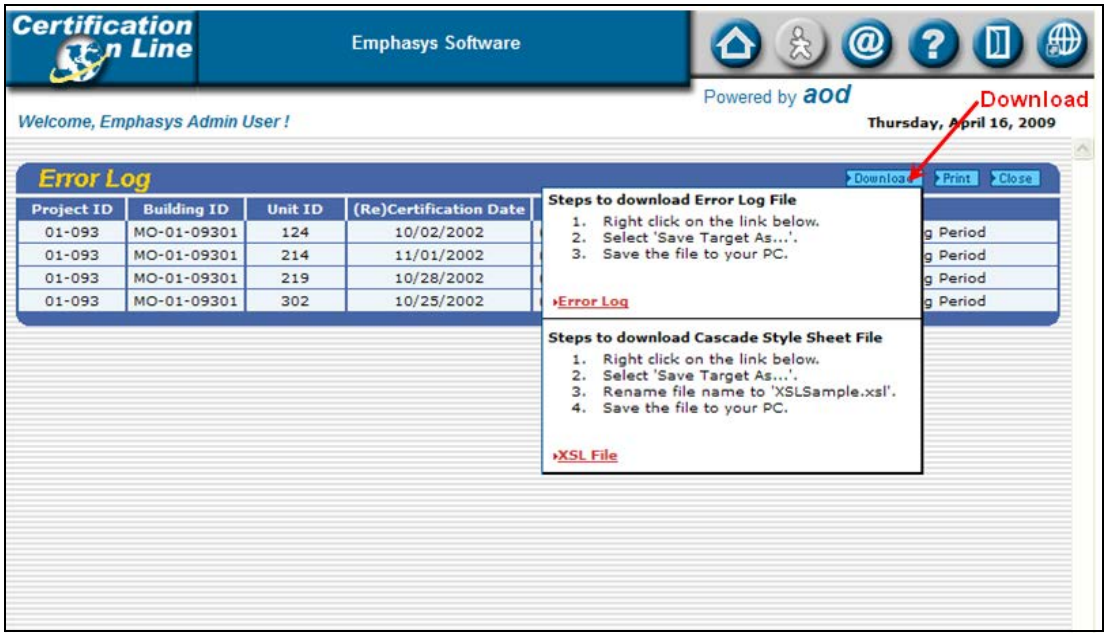
- If errors are detected in the XML file, you will get the Upload Status box with the message, "Errors found in your file. Click on **Click here** to see Error Log."



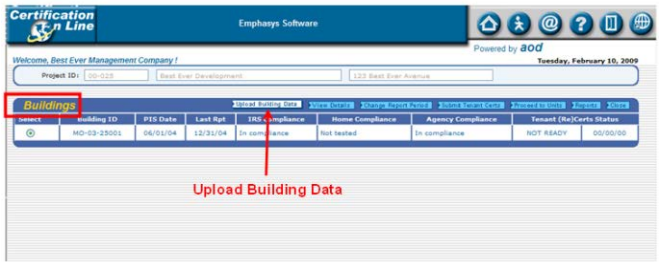
- Click on OK. This will take you to the Error Log Main Screen.

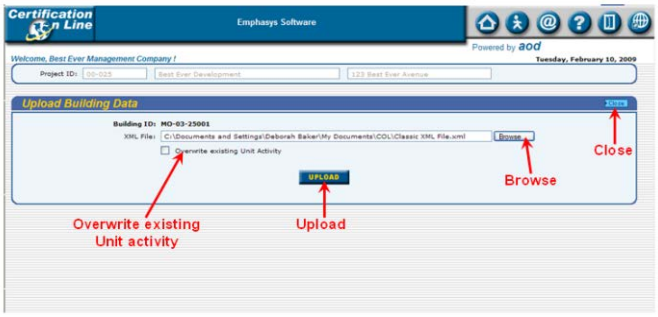


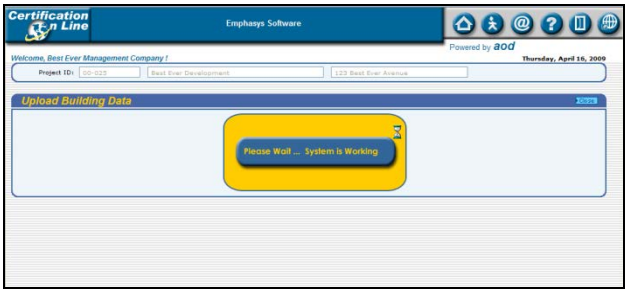
- Here you can choose to download or print the file, or close.
- To download the file, click on the Download button.



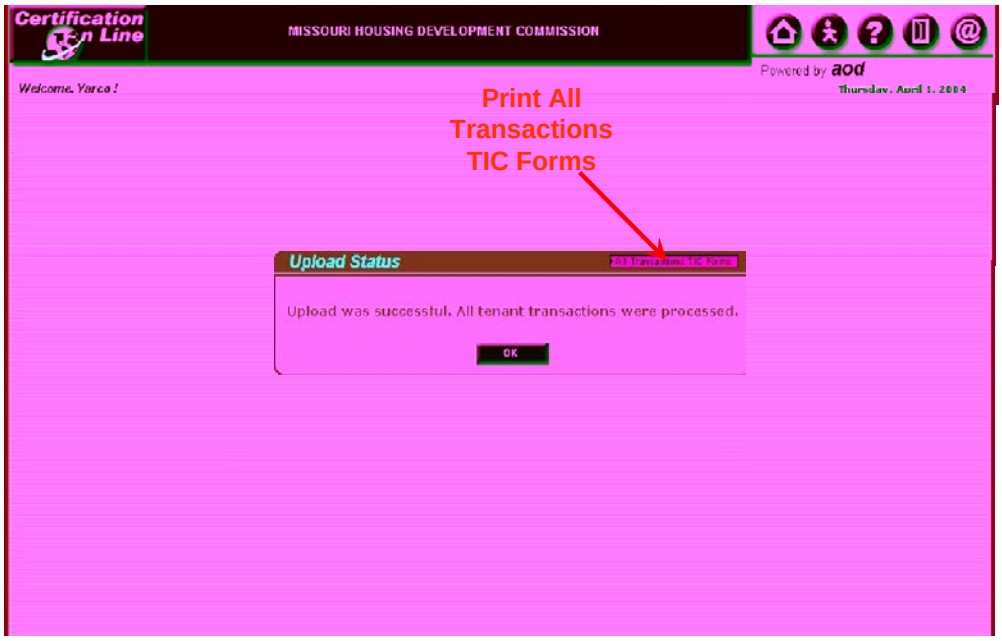
- Follow the instructions on the pop-up window.
- Go back to the property management software and correct the errors listed in the Error Log.
- Return to the Upload Building Data ***Screen*** and repeat the Upload process.







- From the successful Upload Status box, you can print TIC forms for all tenant transactions uploaded.



- To complete the process, click on the OK button. This will return you to the ***Buildings*** sub-menu.

- All of the tenant information for the covering period is now in COL and ready to be submitted to the Agency. See Section 6 for further information on the submission process.