Preface

Thank you for choosing Housing and Development Software's Web Compliance Monitoring System (HDS WCMS). This user guide is intended to be used by users of the HDS WCMS as a step-by-step guide to using the system while explaining the various fields and actions which can be taken. It is recommended that users work through this guide in order to familiarize themselves with WCMS.

NOTE: Adobe Acrobat 6.0 or greater must be installed in order to access any of the WCMS reporting features.

This document covers the following information:

NOTE: This document has been updated to version 9.0.0.

Registering and Logging In

Logging In

To begin using the WCMS, open Internet Explorer and type in the URL address for your organization's WCMS installation. You will be presented with the Login screen.

If you are already a registered user, enter your **User Name** and **Password**, then click **Login** to begin using the application. (Continue by reading the section titled *The Property List Screen*.)

Retrieving Lost Passwords

If you are a registered user and have forgotten your password, click the **Forgot your password** link at the bottom of the Login screen. This opens the Password Assistance screen.

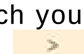
In this screen, enter your WCMS username and your email address in the proper fields and click the **Submit** button. After clicking **Submit**, an email containing password information will be sent to the email address, provided that email address matches the username entered on file. Once finished, click **Back to Login** to return to the Login screen.

Registering as a WCMS User

If you are not yet a registered WCMS user, click the **Need to Register** link below the **User Name** and **Password** fields. This opens the Registration Form screen, in which the information used to create your user profile as well as which projects you wish to participate in is entered.

In the Registration Form, enter the following information:

- Your **First Name** and **Last Name**.
- The **Organization** which you are representing.
- Your full **Address**, including **City**, **State**, and **Zip Code**.
- Your contact information, including **Phone** number, **Fax** number, and **Email**.
- Your **User Name** and **Password**. (Passwords will need to be typed twice, once in the **Password** field, then again the **Confirm Password** field. Password length and requirements are determined by the agency administrators.)

Once that information has been entered, select the role (**Select Role**) in which you will be participating for your projects, and enter the project numbers to which you need access in the **Project Number (Optional)** field. Click the **Move Right** button 

to list that number in the Requested Projects list box. To eliminate a project from the request list, select the number in the Requested Projects box and click the **Move Left** button 

. This will delete the number from the Requested Projects list.

When finished, click **Submit**. At this point, the agency administrators will receive an email informing them of your request. Once the agency administrator grants you access to the system and assigns you project rights, you may log in using the Login screen (discussed previously in this chapter).

NOTE: Not all projects which you listed may be granted. Speak to your administrator for details.

Home > Part I: Logging In and Getting Started > The Property List Screen

The Property List Screen

After logging in, you are presented with the Property List screen.

The Property List screen lists all the properties associated with the projects to which you have been granted access. To select a property to work with, click on its linked name. This opens the Property Work screens, starting with the **Property Work Menu**.

Home > Part II: Overview > Property Work Screen Overview

Property Work Screen Overview

The property work screens are a group of screens which allow you to work with tenant compliance, property, unit vacancy and financial information, as well as allowing you to print reports, and send notifications to the agency. Property work screens are made up of two main components:

- The **Main Menu** (the links across the top of the screen) lists all of the works screens accessible for this property, as well as the property name. The Main Menu is discussed in detail in the next section. (After clicking on the property link in the Property List screen, the Property Work Screen opens, but only the Main Menu is displayed.)
- The **Work Area** (everything below the Main Menu) is where all the actual work on the property is done. It is here that all information regarding the screen and action selected in the Main Menu is displayed.

Home > Part II: Overview > The Main Menu

The Main Menu

When the property is selected in the Property List screen, the Property Work Screen opens, but only displays the Main Menu. Using this menu, you can access the various property information screens available through WCMS.

The Main Menu is made up of the following components:

- **[User Name]'s Menu:** Lists general functions which don't affect or deal with the property.
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- **My Projects:** Closes the property record and opens the Property List screen.
- **My Profile:** Opens the Profile screen, which is used to edit information such as your email, phone number and password. This screen is identical to the registration screen, for the exception of the Project fields, which are not displayed. (For details on the registration screen, see the section titled *Registering as a WCMS User*.)
- **Submit Notice to Agency:** Opens the Submit Notice to Agency screen, used to inform the agency of any changes to the current property. (See *Submit Notice to Agency* for details.)
- **Log Out:** Click this to log out of WCMS.

- **Property:** Lists functions related to property buildings and vacancies.
  -
  - **Property Info:** Opens the Property Info screen, which lists all of the buildings belonging to the current property.
  - **Unit Vacancy:** Opens the Unit Vacancy reporting screen, which allows you to view, record, or edit the number of total and low-income vacant units for the current month within the current property.
  - **Forms:** Opens the WCMS Forms screen, which allows you to download additional forms.

- **Financials: CHFA does not use this module at this time**
- Lists functions related to financial statements, operations, and cash flows.
  -
  - **Statement of Financial Position:** The statement of financial position reports a property's financial status at a set date noted on the statement.
  - **Statement of Operations:** The statement of operations shows a property's revenues and costs over a specific period.
  - **Statement of Cash Flows:** The statement of cash flow reports the inflows and outflows of cash for a particular period for the operating, investing and financing activities undertaken by a property.

- **Tenant:** List functions related to tenant compliance and tenant information uploading.
  -
  - **Tenant Compliance:** Opens the Tenant Compliance screen, which lists all of the buildings within a project or property, as well as the current and past tenants.
  - **Tenant Upload:** Opens the WCMS Tenant Upload screen, which allows you to import tenant data from an XML or Excel file.

- **Reports:** Lists functions relating to printing and exporting property reports.
  -
  - **Occupancy Report:** Opens the Occupancy and Demographic Report screen, which allows you to run Occupancy and Demographic reports in the current property.

- **Help:** Lists functions relating to system help. This is where you will find the help file and manual.

- **[Property]:** The property name. This indicates the property in which all work is being done. Clicking this opens the Property Information screen.

To begin working with the property, click on a menu item and select a function screen from the dropdown list.

NOTE: This guide continues in the recommended workflow pattern.

Home > Part III: Tenants > Tenant Compliance

Tenant Compliance

The Tenant Compliance screen lists all of the buildings within a project or property, as well as the current and past tenants.

The Tenant Compliance screen is divided into two panes. The pane on the left lists all of the buildings within a property, including their units and the residents within those units, past and present. The pane on the right displays the current tenant information and is where various actions regarding the tenant, including moving in, certifying, transferring, and moving out are accessed.

Opening a Tenant Record

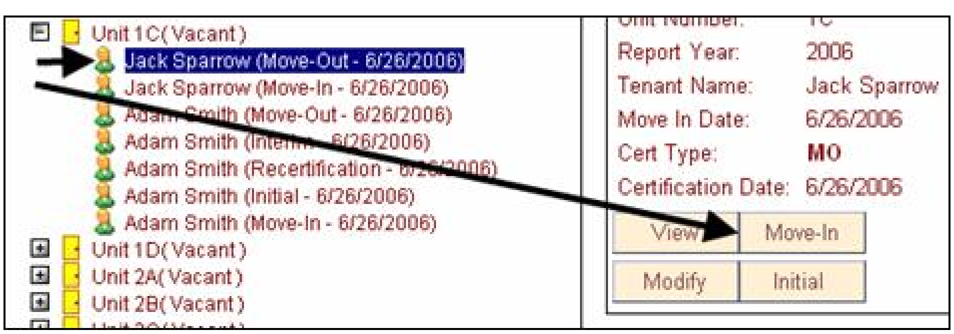
To begin working with a tenant, first click on the **Expand/Contract** button ⊞ next to the building where the tenant resides, has resided, or will reside. The units for that building will now be listed below it. Click the **Expand/Contract** ⊞ button next to the unit to begin working with past, present, or future tenants in that unit.

Moving a Tenant In

IMPORTANT: If tenant information records have been created, they can be imported using the WCMS Tenant Upload screen, described in detail in Unit Vacancy.

To move in a tenant, click the **Expand/Contract** button ⊞ next to the unit where the tenant will be moving into. If the unit is currently vacant, the word **Vacant** will appear next to the unit name. (If the unit is not currently vacant, the previous tenant must be moved out before a new tenant may be moved in. See *Moving a Tenant Out* later in this chapter for details on moving a tenant out.)

- If the unit has been lived in before, click on the top-most record within the unit's tree (this should be a move-out record), then click the **Move-In** button that appears in the right-hand pane.



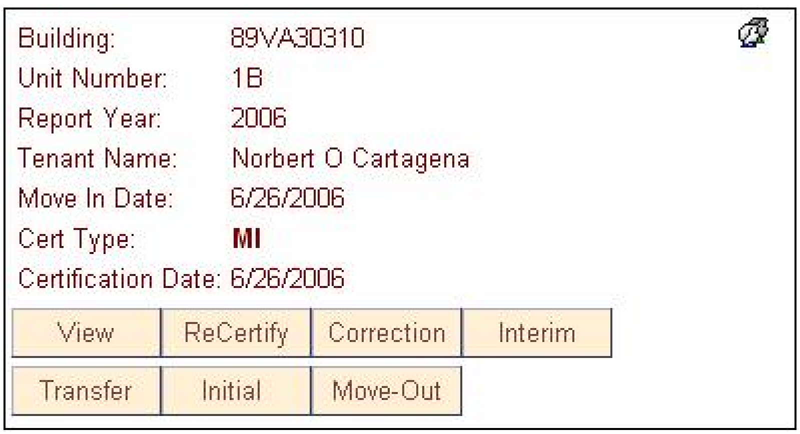
- If the unit has not been lived in before, click on the Move-In link that appears in the unit's tree after clicking the **Expand/Contract** button.

In both cases, this opens the tenant record in a pop-up window. Complete the information in these screens, making sure to click **Save** before leaving a screen. Once completed, click the **Close** button to close the tenant record. Changes made will be reflected in the unit's record, and the new tenant will be listed under the unit record in the left-hand pane.

NOTE: The tenant record screens are covered in detail later in this section.

Once a tenant has moved in, the following fields are displayed and buttons are available in its Tenant Compliance screen record pane (this is the right-hand pane in the Tenant Compliance screen):

NOTE: All fields here are read-only.



- **Building:** The building number where this tenant resides.
- **Unit Number:** The unit within the building where this tenant resides.
- **Report Year:** Reporting year to which this record belongs.
- **Tenant Name:** The full name of the tenant. (Entered in the Household Data Entry screen of the tenant record. This is covered in the section titled *Household Data Entry*.)
- **Move In Date:** The date this tenant moved into this unit. (Entered in the Household Data Entry screen of the tenant record. This is covered in the section titled *Household Data Entry*.)
- **Cert Type:** The current certification type. This can be one of the following:
    - **AR:** Recertification.
    - **IC:** Initial Certification.
    - **IR:** Interim certification
    - **MI:** Move-In.
    - **MO:** Move-Out.
- **Certification Date:** The date the certification was assigned to this member.

- **View (Button):** Click this button to open the tenant record screens in read-only mode.
- **ReCertify (Button):** Click this button to open the tenant record screen in order to recertify the tenant.
- **Correction:** Click this button to open the tenant record screens in order to enter a correction into the current record (of any type).
- **Interim:** Click this button to open the tenant record screens in order to perform the Interim certification for this tenant.
- **Modify:** Click this button to open the tenant record screens in order to modify a correction.
- **Transfer:** Click this button to open the Unit Transfer screen, used when transferring a tenant from one unit to another. (This is discussed in detail in *Transferring a Tenant between Units*, covered later in this chapter.)
- **Initial:** Click this button to open the tenant record screens in order to perform the Initial certification for this tenant.
- **Move-Out:** Click this button to open the tenant record screens in order to move out the tenant.

NOTE: Buttons are listed here in display order. However, this guide discusses these functionalities in the recommended working order. Also, some buttons may not be available. This depends on heavily on the current certification type of the record.

Certifying a Tenant

To certify a tenant, open the tenant record to certify. (See *Opening a Tenant Record* in this chapter for details on opening a record.) Select the top-most record then click either the **Initial** button, **Interim** button or **ReCertify** button according to the certification you wish to perform. This opens a pop-up browser window showing the tenant record screens. (See the section titled *Tenant Record Information* for details.)

In the tenant record screens, make any necessary changes (clicking the **Save** button before leaving each screen), then click **Close** to return to the Tenant Compliance screen. A new certification record will be saved and displayed as the topmost record for this unit in the unit's tree.

Editing a Tenant Record

To edit a tenant's record, first open the tenant record to edit. (See *Opening a Tenant Record* in this chapter for details on opening a record.) Select the tenant record you wish to edit then click the **Modify** button. This opens a pop-up browser window showing the tenant record screens. (See the section titled *Tenant Record Information* for details.)

In the tenant record screens, make any necessary changes (clicking the **Save** button before leaving each screen), then click **Close** to return to the Tenant Compliance screen. All changes are now saved as part of the record.

Viewing a Tenant Record (Read-Only Mode)

To view a tenant's record in read-only mode, first open the tenant record. (See *Opening a Tenant Record* in this chapter for details on opening a record.)Select the tenant record you wish to view then click the **View** button. This opens a pop-up browser window showing the tenant record screens. (See the section titled *Tenant Record Information* for details.) All fields displayed here will be read-only. When finished, click **Close** to return to the Tenant Compliance screen.

Transferring a Tenant Between Units

To transfer a tenant, first open the tenant record belonging to the tenant you wish to transfer. (See *Opening a Tenant Record* in this chapter for details on opening a record.) Select the top-most record then click the **Transfer** button. This opens the Unit Transfer screen in a pop-up window.

In the Unit Transfer screen, enter the **Effective Date** of the move (which defaults to today's date), then select the unit from the **Vacant Units** dropdown. This dropdown lists all of the vacant units in any of the buildings within this project. (Non-vacant units will not be displayed in this list, and hence are not selectable.) Once the new unit has been selected, click the **Transfer** button, then click the **Close** button. The following will occur:

- A new Transfer Out record will be created as the topmost record in the tenant's previous unit.
- The tenant's previous unit will be displayed as Vacant.
- A new Transfer In record will be created as the topmost record in the tenant's new unit and the unit will no longer be listed as Vacant.

Moving a Tenant Out

To move a tenant out, first open the tenant record belonging to the tenant moving out. (See *Opening a Tenant Record* in this chapter for details on opening a record.) Select the top-most record then click the **Move-Out** button. This opens a pop-up browser window showing the tenant record screens. (Tenant record screens are discussed in the section titled *Tenant Record Information*.)

In the tenant record screens, make any necessary changes (clicking the **Save** button before leaving each screen), then click **Close** to return to the Tenant Compliance screen. A new Move-Out record will be created and the unit will be considered vacant by the system.

Submitting a Tenant Correction

To submit a tenant correction, first open the tenant record which should be corrected. (See *Opening a Tenant Record* in this chapter for details on opening a record.) When the record is open, click the **Correction** button. This opens a pop-up browser window showing the tenant record screens. (Tenant record screens are discussed in the section titled *Tenant Record Information*.)

In the tenant record screens, make any necessary changes (clicking the **Save** button before leaving each screen), then click **Close** to return to the Tenant Compliance screen. A new Correction record will be created.

Tenant Record Information

The tenant record is where information regarding the tenant is entered, edited and viewed. Tenant records are divided into the following screens:

- **Household Data Entry:** This screen contains basic information about the tenant, unit, and current certification/action.
- **Certification Information:** This screen contains demographic and other certification category information.
- **Household Members:** This screen contains information on all members of the tenant's household.
- **Household Income & Assets:** This screen contains the tenant household's asset, income, and deduction information.

NOTE: Not all screens may be accessible to you. The screens available here are determined by the requirements set forth by the agency.

Household Data Entry

The Household Data Entry screen contains basic information about the tenant, unit, and current certification/action.

The Household Data Entry screen is made up of the following information fields:

- **Report Year:** Reporting year to which this record belongs. Automatically displayed by the system.
- **Building BIN:** Identification number of the building to which this record belongs. Automatically displayed by the system.
- **Unit:** Unit to which this record belongs. Automatically displayed by the system.
- **Bedroom Size:** Number of bedrooms in this unit. This value comes from the unit record, found in the Building Information screen, found by clicking (from the Main Menu) **Property > Property Info**, then selecting a **Building Name** or **Building ID**. Automatically displayed by the system.
- **Certification Type:** If this is a certification, then the type of certification taking place. Automatically displayed by the system.
- **Action Type:** If this record is not a certification, the most recent type of action performed on this record. Automatically displayed by the system.
- **Move-In Date:** The date this tenant moved in. Select a date from the dropdown calendar.
- **Effective Date:** The date this record took effect. Select a date from the dropdown calendar.
- **First Name, MI, Last Name:** The tenant's first name, middle initial and last name.
- **Contract Rent:** Monthly contract rent for this unit.
- **Utility Allowance:** The expected monthly amount due for utilities in this unit.
- **Utility Type:** The main type of utility supplying power to this unit.
- **Calculated # of Family Members:** Number of family members in this household. This value comes from the **Household Members** tenant record information screen. Automatically displayed by the system.
- **Calculated Household Income:** The tenant's total annual household income. This value comes from the **Household Income & Assets** tenant record information screen. Automatically displayed by the system.
- **Edited Date:** The date this record was last edited.

- **Edited By:** The user who last edited this record.
- **Created Date:** The date this record was originally created.
- **Created By:** The user who created this record.
- **Certification Report:** Clicking this button creates a PDF report using the information provided in the tenant record information screens.

Once all information has been entered, click **Save**. If finished, click **Close**.

NOTE: Information must be saved before moving on to any of the other tenant information screens. If **Save** is not clicked before moving on to a new screen, any new information entered will be discarded.

Certification Information

The Certification Information screen contains demographic and other certification category information.

The Certification Information screen is made up of the following fields:

- **Report Year:** Reporting year to which this record belongs. Automatically displayed by the system.
- **Building BIN:** Identification number of the building to which this record belongs. Automatically displayed by the system.
- **Unit:** Unit to which this record belongs. Automatically displayed by the system.
- **Bedroom Size:** Number of bedrooms in this unit. This value comes from the unit record, found in the Building Information screen, found by clicking (from the Main Menu) **Property > Property Info**, then selecting a **Building Name** or **Building ID**. Automatically displayed by the system.
- **Head of Household:** Full name of the tenant's head of household, as defined in the Household Data Entry screen. Automatically displayed by the system.
- **Owner Income Designation:** Owner-reported income classification of this unit. Select an option from the dropdown menu.
- **Owner Rent Designation:** Owner-reported rent classification of this unit. Select an option from the dropdown menu. (This is a required field.)
- **Subsidy Type:** Type of subsidy for this tenant, if any. Select an option from the dropdown menu.
- **Subsidy $:** Amount of monthly subsidy for this tenant.
- **Student HH:** Indicates that the head of this household is a full-time student. This field is only editable if the Household Members screen is not available as part of the tenant information record. (This is referred to as being in the Summary mode, as opposed to the Detailed mode.)
- **Number of Full Time Students:** The number of full-time students in this household. This field is only editable if the Household Members screen is not available as part of the tenant information record. (This is referred to as being in the Summary mode, as opposed to the Detailed mode.)
- **Household Type:** The type of household. Select an option from the dropdown menu.
- **Head of Household Gender:** Gender of the tenant's head of household. Select an option from the dropdown menu.
- **Social Services:** Social services provided to the tenant household (if any). Select an option from the dropdown menu.
- **Number of Dependents under 18:** The number of dependents under 18 in this household. This field is only editable if the Household Members screen is not available as part of the tenant information record. (This is referred to as being in the

Summary mode, as opposed to the Detailed mode.) Otherwise, this value is calculated from the information supplied in the Household Members screen.

- **Homeless Prior**: Checking this box indicates that a person designated as handicapped is a member of the household.
- **HH Age At Cert:** Head of household's age at the time of this record's **Effective Date**. Automatically displayed by the system.
- **Handicapped:** Check this box to indicated that a person designated as handicapped is a member of the household.
- **HH Age At Cert:** The age of the Head of Household at the time of the most recent certification.
- **Household Race:** Racial designation of this household. Select all options that apply.
- **Demographic Information**
    - **Head of Household Primary Sources of Income:** The primary source of income in the tenant's household. Select an option from the dropdown menu.
    - **Head of Household Occupation:** The head of household's occupation. Select an option from the dropdown menu.
    - **Number of Occupants 62 and Over:** Total number of persons age 62 and currently in the household. This field is only editable if the Household Members screen is not available as part of the tenant information record. (This is referred to as being in the Summary mode, as opposed to the Detailed mode.) Otherwise, this value is calculated from the information supplied in the Household Members screen.
    - **Number of Adults with Income:** Total number of adult residents in the household with income. This field is only editable if the Household Members screen is not available as part of the tenant information record. (This is referred to as being in the Summary mode, as opposed to the Detailed mode.) Otherwise, this value is calculated from the information supplied in the Household Income & Assets screen.
    - **Is this a Single Parent Household:** Checking this box indicates that this is a single parent household.
- **Program Type:** The available programs this unit could qualify for, as selected by the unit.
- **Tenant Program Type:** The program type this unit is designated as by the property manager (or the person working with this record).

Selecting and Unselecting Program Types

To select a program type to apply to this unit, select the types (or types, by pressing and holding the **CTRL** key on the keyboard while selecting) from the **Program Type** field and click the **Move Right** > button.

To remove a program type, select a type (or types, by pressing and holding the **CTRL** key on the keyboard while selecting) from the Tenant Program Type field and click the **Move Left** < button.

Once all information has been entered, click **Save**. If finished, click **Close**.

NOTE: Information must be saved before moving on to any of the other tenant information screens. If **Save** is not clicked before moving on to a new screen, any new information entered will be discarded.

Household Members

The Household Members screen contains information on all members of the tenant's household.

NOTE: This screen is only viewable if the agency required Detailed information, as opposed to just a Summary.

The Household Members screen is made up of the following fields:

- **Report Year:** Reporting year to which this record belongs. Automatically displayed by the system.
- **Building BIN:** Identification number of the building to which this record belongs. Automatically displayed by the system.
- **Unit:** Unit to which this record belongs. Automatically displayed by the system.
- **Bedroom Size:** Number of bedrooms in this unit. This value comes from the unit record, found in the Building Information screen, found by clicking (from the Main Menu) **Property > Property Info**, then selecting a **Building Name** or **Building ID**. Automatically displayed by the system.
- **Head of Household:** Full name of the tenant's head of household, as defined in the Household Data Entry screen. Automatically displayed by the system.

  NOTE: The **Head of Household** is automatically added to the Members grid, although information for this person must still be supplied in order to have a complete record.

- **Members:** This grid lists all of the household members, and includes the following information on each member (field names bolded): **Social Security** number, **Last Name**, **First Name**, **Middle Initial**, **Relationship** to the Head of Household, **Gender**, **Birth Date**, **Special Status** (see the **Special Status Legend** at the bottom of the screen for possible values), **Alien Reg. Number**, **Ethnicity**, **Age At Cert** (calculated from the **Birth Date**), **LIHTC Full-time Student**, **Marital Status**, and race codes, including American Indian/Alaskan Native, Asian, African American/Black, Native Hawaiian/Pacific Islander, White, Other, and Race Refused.

Adding a Household Member

To add a household member, click the **Add** button at the bottom of the screen. This adds a new row to the **Members** grid. Fill out the information on each of the fields and click **Save**.

Deleting a Household Member

To delete a household member, click on the blue box adjacent to the member's name in the **Members** grid. This will highlight the entire row. Press the **Delete** key on your keyboard to delete the member.

Once all information has been entered, click **Save**. If finished, click **Close**.

NOTE: Information must be saved before moving on to any of the other tenant information screens. If **Save** is not clicked before moving on to a new screen, any new information entered will be discarded.

Household Income & Assets

The Household Income & Assets screen contains the tenant household's asset, income, and deduction information, separated into three grids. The sum of all items in each grid is displayed below it and also copied to other screens in the tenant record.

The Household Income & Assets screen is made up of the following fields:

- **Report Year:** Reporting year to which this record belongs. Automatically displayed by the system.
- **Building BIN:** Identification number of the building to which this record belongs. Automatically displayed by the system.
- **Unit:** Unit to which this record belongs. Automatically displayed by the system.
- **Bedroom Size:** Number of bedrooms in this unit. This value comes from the unit record, found in the Building Information screen, found by clicking (from the Main Menu) **Property > Property Info**, then selecting a **Building Name** or **Building ID**. Automatically displayed by the system.
- **Head of Household:** Full name of the tenant's head of household, as defined in the Household Data Entry screen. Automatically displayed by the system.
- **Household Assets:** This grid lists all assets for a household, such as investments and savings.
    -
    - **Asset Type:** The type of asset owned by persons in this household.
    - **Asset Status:** The current status for this asset. Options are:
        -
        - *Average*: The average value of this asset.
        - *Current*: Currently owned by this household.
        - *Imputed*: Disposed of within the last 24 months.
    - **Cash Value:** The cash value of this asset.
    - **Annual Income:** Estimated annual income derived from this asset.

- **Asset Summary**
    -
    - **Imputed Asset Income:** Total imputed asset income for the household. Automatically displayed by the system.
    - **Asset Income:** Total asset income for the household. Automatically displayed by the system.

- **Household Income:** This grid lists the incomes for all members of this household.
    -
    - **Member Name:** The name of the household member to which this income belongs. Dropdown values include all eligible household members.
    - **Income Type:** The type (HUD category) of this income item. Select an option from the dropdown menu.
    - **Amount:** Amount of annual income this household member receives or expects from this income type.

- **Income Summary**
    -
    - **Non-Asset Income:** Total of all entries in the Amount column. Automatically displayed by the system.
    - **Annual Income: `[Asset Income] + [Non-Asset Income]`**. Automatically displayed by the system.

- **Household Deductions:** This grid lists all of the household deductions for members of this household. This grid is informational only.
  -
  - **Member Name:** The name of the household member to which this income belongs. Dropdown values include all eligible household members.
  - **Deduction Type:** The type of deduction.
  - **Amount:** Amount of this deduction.

Adding an Asset, Household Income, or Household Deduction

To add an asset, a household income, or a household deduction record, first click the **Add** button ***directly below*** the grid of the record type you wish to add. A new row will appear in the grid. Enter the information necessary using the provided fields, then click the **Save** button at the bottom of the screen.

Deleting an Asset, Household Income or Household Deduction

To delete an asset, a household income, or a household deduction record, click on the blue box  adjacent to the record in the appropriate grid. This will highlight the entire row. Press the **Delete** key on your keyboard to delete the record. Click the **Save** button at the bottom of the screen.

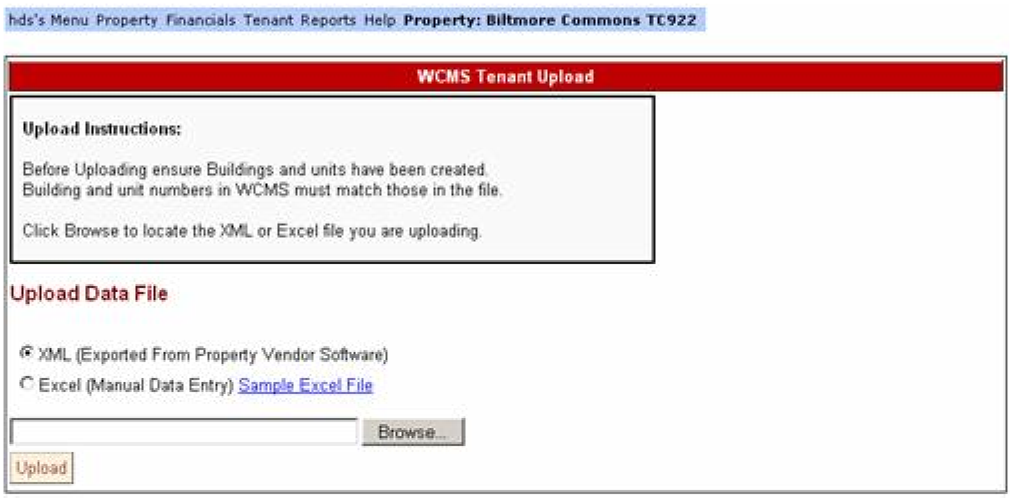
Once all information has been entered, click **Save**. If finished, click **Close**.

NOTE: Information must be saved before moving on to any of the other tenant information screens. If **Save** is not clicked before moving on to a new screen, any new information entered will be discarded.

Tenant Upload

The WCMS Tenant Upload screen allows you to import tenant data from an XML or Microsoft Excel file.

IMPORTANT: All buildings and units for the project should be created before performing this upload process.



Uploading Tenant Data

To upload a tenant data file, select whether the file to be uploaded will be an XML file or an Excel file.

NOTE: XML files are generally exported from property vendor software using industry standards for this type of information. Excel files can be exported by some systems, but are generally created via manual data entry. (Click on the **Sample Excel File** link to see an example Excel tenant data file.)

After selecting, click the Browse button to locate the file on your computer, or type in the path to the file. (ex: **`C:\Documents and Setings\...`**). Once a file has been selected, click the **Upload** button. The information is now ready to use.

Home > Part IV: Properties > Property Info

Property Info

The Property Info screen lists all of the buildings belonging to the current project. The Property Info screen is made up of the following read-only information fields:

- **Number of Buildings on File:** The total number of buildings in this project.
- **Number of Units on File:** The total number of units within all buildings in this project.
- **Is Scattered Site:** Indicates whether or not this is a designated Scattered Site project.
- **Grid**

-
  - **Building Name:** The name given to this building in the project.
  - **Building ID:** ID number given to this building.
  - **Address:** Street address where this building is located.
  - **Number of Units:** Total number of units currently on record for this building.

To access or edit the information for the units in any building listed here, click on the building's name or ID. This opens the Building Information screen.

Building Information

The Building Information screen contains information on every unit in the building selected in the Property Info screen. It is in this screen that a unit can be added, its name and specification information edited, and if necessary, deleted.

NOTE: Data in this screen is view-only for Section 8 properties.

The Building Information screen is made up of the following fields:

- **Building Name:** Name given tot his building within the project. Automatically displayed by the system.
- **Building ID:** ID number given to this building.
- **Number of Units on File:** The total number of units with current records for this building. Automatically displayed by the system.
- **Building Locked:** A checkmark in this box indicates that this building's information cannot be edited.
- **Units in Building:** A listing of all the units in this building. Select a unit name from here in order to view or edit its specifications.
- **Unit Number:** The designated unit number for the unit selected in the **Units in Building** field.
- **Number of Bedrooms:** The number of bedrooms in the unit selected in the **Units in Building** field.
- **Square Footage:** Total square footage of the unit selected in the **Units in Building** field.
- **Unit is Occupied:** A checkmark indicates that this unit is currently occupied. Read-only field.
- **Unit is Section 8:** A checkmark indicates that this is a section 8 unit.
- **Accessibility:** Handicaps for which this unit has been designed. Check as many options as apply. Options are **Mobility Impaired**, **Visually Impaired**, and **Hearing Impaired**.

At the bottom of the screen there are four buttons:

- **Apply Updates:** Once changes have been made to the current unit, click this button to save any changes.
- **Add New:** Click this button to add a new unit. Once all information fields in this screen have been completed, click **Apply Updates** to save that unit.
- **Reset:** Click this button to discard any unsaved changes in this unit.
- **Delete Unit:** Click this button to delete the current unit.

Adding a Unit

To add a new unit to a building, click the **Add New** button. A *New Unit* item will show up and be highlighted in the **Units in Building** field. Fill in all the necessary fields and click **Apply Updates** to save the information.

NOTE: A new unit may not be added if it would exceed the building unit count.

Editing a Unit

To edit an existing unit's information, first select the unit from the **Units in Building** list. Its information will automatically populate the fields in the Building Information screen. Edit the information as necessary and click **Apply Updates** to save the information. Before clicking **Apply Updates**, you can click **Reset** to discard any unsaved information.

Deleting a Unit

To delete an existing unit, select the unit from the **Units in Building** list. Click **Delete Unit** to delete it from the system.

NOTE: A unit may not be deleted if it is currently occupied.

Home > Part IV: Properties > Unit Vacancy

Unit Vacancy

The Unit Vacancy reporting screen allows you to view, record, or edit the number of total and low-income vacant units for any month.

To edit this screen's information, first select a year from the **Year** field. (A year can be added by entering the year in the blank field next to the **Year** field and click the **Add Report Year** button.) Enter the total number of vacant units in the **Vacant Units** field for the appropriate **Month**, as well as the total number of vacant **Low Income Units** for that month. Once completed, click the **Save** button.

Home > Part IV: Properties > Forms

Forms

The Forms screen only appears if defined by the agency, and displays a list of additional forms which can be downloaded.

To save these to your hard drive, right click on the form name and click **Save Target As**.

To open the form to another screen, hold the Shift key and click on the form name, or right-click on the form name and select **Open in New Window** (or **Open in New Tab**).

Administrator's Note: Links for this page are edited in the web.config file found in the main WCMS directory.

Home > Part V: Financials > Working with the Financials Screens

Working with the Financials Screens

CHFA does not use this module at this time.

Home > Part VI: Reports and Notices > Occupancy and Demographic Report

Occupancy and Demographic Report

To begin working with reports, click the **Reports** menu in the Main Menu and select **Occupancy Report**.

The Occupancy and Demographic Report screen lets you run Occupancy and Demographic reports on the current project.

The Occupancy and Demographic Report screen is made up of the following fields:

- **Select Report Type:** Use the radio buttons to select which report(s) you want to run. Options are **Occupancy**, **Demographics**, or **Both**.
- **Select Report Criteria:** Use the radio buttons to run the report(s) **By Report Year** or **By Date Range**.
  - If **By Report Year** is selected, the year must be selected from the **Report Year** dropdown.
  - If **By Date Range** is selected, the range must be selected from the **From Date** and **To Date** fields. (Select the dates from the dropdown calendars which appear when you click on the dropdown button, or enter the date manually in MM/DD/YYYY format.)
- **Current Tenants:** Check this box to include only current tenants in this report. Otherwise all tenants, past and present, will show up on the report.

Once the options are selected, click the **View** button to run the report, which will be presented as a PDF which can then be saved to your computer or printed.

Home > Part VI: Reports and Notices > Submit Notice to Agency

Submit Notice to Agency

To begin submitting a notice to the agency, click on **HDS's Menu** in the Main Menu and select **Submit Notice to Agency**.

The Submit Notice to Agency functionality allows you to inform the agency that project data is being submitted for review. Changes made to tenant and building records are not automatically reported, so this functionality is crucial after changes are made which the agency should be made aware of.

The Submit Notice to Agency screen is made up of the following fields:

NOTE: All editable fields should be filled in by default with the proper information.

- **For:** The name of the property for which this notice is being sent.
- **On:** The date and time when this notice is being sent.
- **By:** The user sending this information.

- **Previous Submissions:** A list of all previous submissions made regarding this property. Displays when the previous submissions were made (**Submitted On**) and who they were submitted by (**Submitted By**).

Once all information has been verified, click **Submit** to submit the notice to the agency. This will send an email to agency administrators informing them that information must be reviewed.