

## WCMS Cheat Sheet and Troubleshooting Guide

### “Actions” Cheat Sheet:

| ACTIONS               | LOCATION   | DESCRIPTION  |
|-----------------------|--|--|
| Edit Profile          | Click on user name in top, right corner of WCMS and select “Profile”   | Allows user to update profile information such as email address and phone number. Should <b>not</b> be used to assign a new user to an existing login (all new users need to register for their own login account).  |
| Change Password       | Click on user name in top, right corner of WCMS and select “Profile”   | Allows user to update their existing WCMS password.  |
| Upload Tenant Data    | Home > Properties > <i>Specific Property</i>   | For users of Yardi, OneSite, and HAB, Inc. to upload tenant data from the property software.   |
| Current Tenants       | Home > Properties > <i>Specific Property</i> > <b>Places:</b> Occupancy and Demographics Report  | Allows for users to view only the property’s Current Tenants on the Occupancy and Demographics report  |
| Add unit              | Home > Properties > <i>Specific Property</i> > <i>Specific Building</i>  | Used to add missing units to a particular building   |
| Edit Unit             | Home > Properties > <i>Specific Property</i> > <i>Specific Building</i> > <i>Specific Unit</i>   | Used to edit the physical details of the unit, such as the unit number, square footage, unit type or designate as a HOME unit.   |
| Occupy Unit           | Home > Properties > <i>Specific Property</i> > <i>Specific Building</i> > <i>Specific Unit</i>   | <b>For vacant units only.</b> Used for creating a new Initial or Move-In certification.  |
| Unit Transfer         | Home > Properties > <i>Specific Property</i> > <i>Specific Building</i> > <i>Specific Unit</i>   | <b>For occupied units only.</b> Used for transferring the existing tenant to a new, unoccupied unit.   |
| Move Out              | Home > Properties > <i>Specific Property</i> > <i>Specific Building</i> > <i>Specific Unit</i>   | <b>For occupied units only.</b> Used for moving the entire household out of the unit.  |
| Recertify             | Home > Properties > <i>Specific Property</i> > <i>Specific Building</i> > <i>Specific Unit</i>   | <b>For occupied units only.</b> Used for all new interim or annual recertifications.   |
| Edit Certification    | Home > Properties > <i>Specific Property</i> > <i>Specific Building</i> > <i>Specific Unit</i> > <i>Specific Household</i> > <i>Specific Certification</i> | <b>For un-submitted certifications only.</b> Allows the user to make edits to the existing certification, including rent, UA, member info, income & asset info, etc.   |
| Submit Certification  | Home > Properties > <i>Specific Property</i> > <i>Specific Building</i> > <i>Specific Unit</i> > <i>Specific Household</i> > <i>Specific Certification</i> | <b>For un-submitted certifications only.</b> Once a certification has been entered for a household and no more edits need to be made, this action must be done. If a certification is not submitted, future actions/certifications cannot be completed.  |
| Delete Certification  | Home > Properties > <i>Specific Property</i> > <i>Specific Building</i> > <i>Specific Unit</i> > <i>Specific Household</i> > <i>Specific Certification</i> | <b>For un-submitted certifications only.</b> Prior to submitting a certification, users are able to delete the certification from the system. Once the certification is deleted, it cannot be recovered and the household data/certification must be re-entered.   |
| Correct Certification | Home > Properties > <i>Specific Property</i> > <i>Specific Building</i> > <i>Specific Unit</i> > <i>Specific Household</i> > <i>Specific Certification</i> | <b>For submitted certifications only.</b> Once a certification has been submitted, users can correct the certification using this option. It should be noted that this will create a new “corrected” certification in addition to the original certification (i.e. Move-in Correction, Recertification Correction, etc.). Not available for use with Unit Transfer Out or Move Out certifications. |

***“Places” Cheat Sheet:***

| <b>PLACES</b>                     | <b>BREADCRUMB LOCATION</b>   | <b>DESCRIPTION</b>   |
|-----------------------------------|--|--|
| Occupancy and Demographics Report | Home > Properties > <i>Specific Property</i>   | Allows users to create an Occupancy and Demographics report for that property.   |
| Tenant Income Certification (TIC) | Home > Properties > <i>Specific Property</i> > <i>Specific Building</i> > <i>Specific Unit</i> > <i>Specific Household</i> > <i>Specific Certification</i> | Allows users to view/print the TIC for a specific tenant’s certification record. |

***Troubleshooting Guide:***

| <b>PROBLEM</b>  | <b>SOLUTION</b>  |
|---|--|
| WCMS webpage “Cannot be found”  | The new version of WCMS has a new location (please update any shortcuts, bookmarks or favorites to this new address):<br><a href="https://chfaac.chfainfo.com/Login/Login?ReturnUrl=%2f">https://chfaac.chfainfo.com/Login/Login?ReturnUrl=%2f</a>   |
| Forgot User Name or Password  | Please email Peggy Boyd at <a href="mailto:pboyd@chfainfo.com">pboyd@chfainfo.com</a>  |
| Not all properties are showing in property list (or incorrect properties are showing)   | Please email Peggy Boyd at <a href="mailto:pboyd@chfainfo.com">pboyd@chfainfo.com</a> with the necessary corrections.  |
| Not all the units for a particular building are in the system   | Provided that you have not reached the building’s “unit cap” (max # of allowable units), you can add a unit to the building by clicking “Add Unit” under a specific building’s Actions. Be sure to include the unit number, unit type and square footage.  |
| The only Action available for a particular unit is “Edit Unit”, but I need to enter a new certification (move-in, recert, etc.) | In the Household list for this unit, most likely you will see that the “All Submitted” box is unchecked. Click on “View” next to the household name with the unchecked box, then look at the list of certifications for that household. Select the certification that shows that it has not been submitted, by clicking “View” next to that cert. Click “Submit Certification” for that certification. Once you navigate back to the Unit screen, you should now have the ability to complete a new certification. |
| When I click on an Action to create a new certification, nothing happens  | Please make sure you are using Internet Explorer as your web browser and that the browser’s Compatibility View is turned off. To do this, click on the browser’s “Tools” menu and look to see if “Compatibility View” has a check mark next to it. If yes, click “Compatibility View” to uncheck it.   |
| The Max Rent or Max Income Limit is incorrect.  | Please email Peggy Boyd at <a href="mailto:pboyd@chfainfo.com">pboyd@chfainfo.com</a>  |
| I need to print/view the Occupancy and Demographics report for my property.   | Select the specific property from your property list, and click Occupancy and Demographics Report from the “Places” section. You can use the filters and field chooser to customize the report to best show you the data you want to see (or select “Current Tenants” from the Occupancy and Demographics report’s Actions). <b>It is recommended that you export the report to Excel for best viewing.</b>  |