

NextGen Tenant Data Upload

Certain property software programs can create a file which contains the property's tenant certification data in a specific format for uploading into NextGen. Using this feature is very efficient and eliminates the need for property personnel to manually enter their tenant certifications in NextGen, therefore reducing the chance for errors to occur. Below are some of the software companies with the capability to create this tenant data file:

- Yardi
- Real Page
- HAB, Inc.
- Boston Post

It is recommended that you contact your property software technical support to find out if your software can create a Tenant Upload file (often referred to as the "NAHMA standard XML tenant data file"), and whether your software has been updated to create the file in the most current version.

Once you have determined that your software can create a file with your tenant data, there are a few things that need to be done at your property and at CHFA before you can upload into NextGen:

Set Up Your Software

Before uploading your tenant data into NextGen, you first need to add a few pieces of information to your property's software. Doing so ensures that NextGen will recognize certain pieces of data, such as the property name, building numbers and unit numbers:

1. CHFA Property # - This is the number that CHFA assigns to each property. Please refer to the "LIHTC/CHFA Loan Properties" document or NextGen for this number, which typically begins with "9Z". This number needs to be entered in the appropriate field in your software as the "Project Number". If you are unsure where to enter this number in your software, please contact your software technical support.
2. Building ID Numbers (BINs) – It is necessary that the Building ID Numbers are entered in your property software and that the number's formatting matches exactly as it appears in NextGen. For tax credit properties, this format will contain a two-digit state code (CO), the two-digit allocation year (17) and five identifying digits (e.g. CO-17-12345). Your BIN in your software needs to include all digits and dashes.
3. Unit Numbers – The format of the unit numbers in your property software must match the formatting in NextGen exactly, including any punctuation.

Permissions for the XML Tenant Upload feature

To upload your tenant data to NextGen, it is necessary that you have the proper permissions. Please contact Peggy Boyd (pboyd@chfainfo.com) to have these permissions added to your user account. Once the permissions are added to your NextGen account, you will navigate to the Property Group > Tenant > XML Tenant Upload tab.

Uploading Tenant Data (FINALLY!)

Once your property software includes all the necessary data and you have the permissions to upload your XML Tenant Upload file in NextGen, you are ready to upload your first file. If you receive any errors when uploading, please view the "NextGen 2 – Uploading Tenant Data" video for instructions to troubleshoot your tenant file, or contact Peggy Boyd at pboyd@chfainfo.com.

A few things to keep in mind:

- Certifications should be entered into NextGen monthly, by the 10th of the month for the previous month's certifications.
- It is recommended that you upload no more than 3 months of data at a time. If any errors occur, it is easier to troubleshoot errors for a month or two than it is for an entire year.
- After uploading your tenant data, it is recommended that you run an Occupancy and Demographics Report from NextGen to ensure that all the data has been populated correctly.

If you have any questions regarding any information found within this document or uploading tenant data into NextGen, please contact Peggy Boyd at pboyd@chfainfo.com.