Web Compliance Management System

User's Guide

HDS

HOUSING AND DEVELOPMENT SOFTWARE

Housing & Development Software
Document updated August 2005

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How To Do It

Getting Started

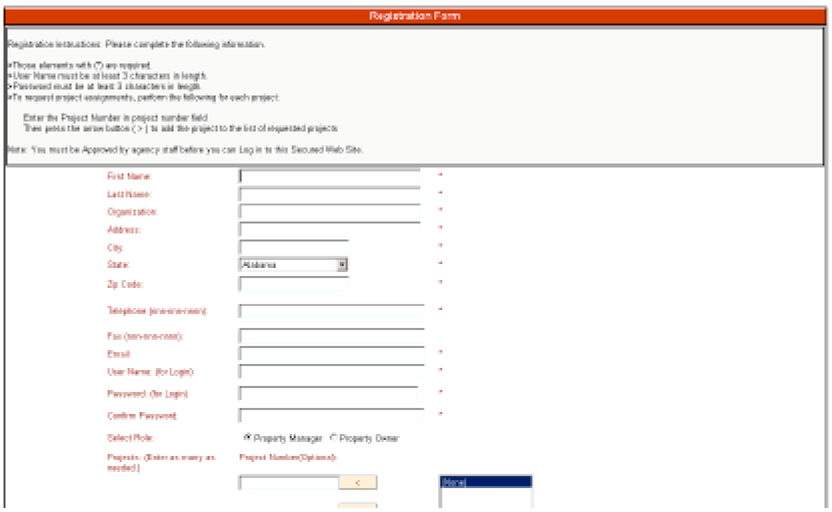
First, log in before using the system. You establish your username and password when you register .

Logging in brings you directly to the Assigned Projects screen. Click on a property name to go to the Main Menubar of functionality for that property, or select an item under hds's Menu to view your user profile or to log out.

User Maintenance

Registration

You must register before you can Log In to the "secured" area of the system.



Pressing the **Registration** button brings you to the Registration Form screen, where you may "register" (apply for access to the system).

To register:

1. Complete the fields in this screen. Those marked with an asterisk are required. Note: Entries for User Name and Password are case sensitive, so make sure to remember how you have entered your requested user name and password.

2. Next to **Select Role**, indicate whether you are a **Project Manager** or a **Property Owner**.

3. You must enter at least one project that you want to work with. To do so, enter a number in the **Project Number** box and press the **>** button to move it to the listing on the right. Repeat this for every project for which you are requesting access.

4. Press **Submit** at the bottom. A Registration Accepted screen will appear if you have entered the information correctly. Note that you will not be able to Log In immediately – your registration must be approved first by the agency before you can log in.

Once you have registered, you can change your password or other information at any time by using the Profile function.

First Name: User's first name. *Required.*
Last Name: User's last name. *Required.*
Organization: User's organization. *Required.*
Address: Organization's address. *Required.*
City: City where your organization is located. *Required.*
State: State where your organization is located. *Required. Select from the dropdown menu.*
Zip Code: Organization's zip code. *Required.*
Telephone: Organization's phone number. *Required.*
Fax: Organization's fax number.
Email: User's email address. *Required.*
User Name: Name used to log onto the system (must be at least 7 characters). *Required.*
Password: Password used to log onto the system (must be at least 7 characters). *Required.*
Confirm Password: Password used to log onto the system (must be same as above). *Required.*
Select Role: User's function in this system. *Required. Select one.*
Projects: For each project you want to be assigned, enter its number in the Project Number box and press the **>** button to move it to the box on the right.

Submit: Submit the entered information into the system.
Reset: Clear all fields.

Working with Tenants

Moving In a Tenant

1. If you have not already done so, select a project in the Assigned Projects screen and select **Tenant Compliance** from the Tenant menu.
2. Find the unit by pressing the plus-sign next to the building, then press the plus-sign next to the unit to see all of the tenant records belonging to that unit.
3. Under the unit, select the tenant record at the top. (This will be Move-In record for first-time move-ins, and the former tenant's Move-Out record otherwise.)
4. Press the **Move In** button in the box on the right. *Note: if the **Move In** button does not appear, you must first move out the previous tenant and then press the **Refresh Building/Unit Tree** button before trying to move in the new tenant.*
5. A new browser instance will be launched, displaying the new Tenant Record .
6. Complete all four subscreens in the record: Household Data Entry , Certification Information , Household Members , and Household Income & Assets . *NOTE: Be sure to press the **Save** button before leaving each screen*.
7. Press **Close** when you are done. The Tenant Record will close and the new record will be saved under the unit in the Tree.

Certifying a Tenant

1. If you have not already done so, select a project in the Assigned Projects screen and select **Tenant Compliance** from the Tenant menu.
2. Find the unit by pressing the plus-sign next to the building, then press the plus-sign next to the unit to see all of the tenant records belonging to that unit.
3. Under the unit, select the tenant record at the top of the list. This will be the most recent tenant record

for the unit, from which all information will be copied and upon which you can make changes.

4. On the right, press **Initial**, **Interim**, or **Recertify** according to the certification that you want to perform.
5. A new browser instance will be launched, displaying the new Tenant Record .This record will contain information copied from the record you selected.
6. Complete and make changes to the four subscreens in the record: Household Data Entry , Certification Information , Household Members , and Household Income & Assets . *NOTE: Be sure to press the **Save** button before leaving each screen*.
7. Press **Close** when you are done. The Tenant Record will close and the new record will be saved under the unit in the Tree.

Changing a Tenant Record

1. If you have not already done so, select a project in the Assigned Projects screen and select **Tenant Compliance** from the Tenant menu.
2. Find the unit by pressing the plus-sign next to the building, then press the plus-sign next to the unit to see all of the tenant records belonging to that unit.
3. Under the unit, select the tenant record that you want to change.
4. The header information for the record will be displayed on the right. Press **Modify**.
5. A new browser instance will be launched, displaying the Tenant Record .This record will contain the information in the record you selected.
6. Complete and make changes to the four subscreens in the record: Household Data Entry , Certification Information , Household Members , and Household Income & Assets . *NOTE: Be sure to press the **Save** button before leaving each screen*.
7. Press **Close** when you are done. The Tenant Record will close and the changes will be saved.

Viewing a Tenant Record

1. If you have not already done so, select a project in the Assigned Projects screen and select **Tenant Compliance** from the Tenant menu.
2. Find the unit by pressing the plus-sign next to the building, then press the plus-sign next to the unit to see all of the tenant records belonging to that unit.
3. Under the unit, select the tenant record that you want to view.
4. The header information for the record will be displayed on the right. Press **View**.
5. A new browser instance will be launched, displaying the Tenant Record .This record will contain the information in the record you selected.
6. You can move among the four subscreens in the record by pressing the buttons at the top of the screen: Household Data Entry , Certification Information , Household Members , and Household Income & Assets .
7. Press **Close** when you are done. The Tenant Record will close.

Moving Out a Tenant

1. If you have not already done so, select a project in the Assigned Projects screen and select **Tenant Compliance** from the Tenant menu.
2. Find the unit by pressing the plus-sign next to the building, then press the plus-sign next to the unit to see all of the tenant records belonging to that unit.
3. Under the unit, select the most recent tenant record at the top of the list.
4. The header information for the record will be displayed on the right. Press **Move-Out**.
5. A new browser instance will be launched, displaying the Tenant Record .This record will contain the information in the record you selected.
6. Complete and make changes to the four subscreens in the record: Household Data Entry ,

Certification Information , Household Members , and Household Income & Assets . The **Effective Date** field in the **Household Data Entry** screen will serve as the **Move-Out Date**. *NOTE: Be sure to press the **Save** button before leaving each screen*.

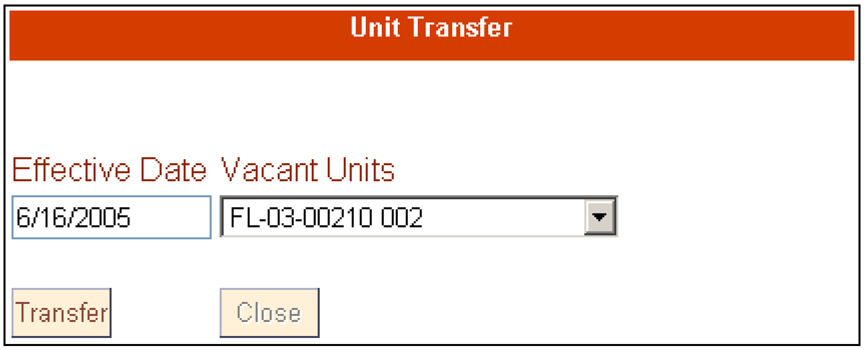
7. Press **Close** when you are done. The window will close and the record will be saved as a “Move-Out” record for the unit. The unit will now be considered vacant by the system (enabling a later move-in).

Submitting a Tenant Correction

1. If you have not already done so, select the project in the Assigned Projects screen and then select **Tenant Compliance** from the Tenant menu .
2. Find the unit by pressing the plus-sign next to the building, then press the plus-sign next to the unit to see all of the tenant records belonging to that unit.
3. Under the unit, select the tenant record that you want to base the correction on.
4. The header information for the record will be displayed on the right. Press **Correction**.
5. A new browser instance will be launched, displaying the Tenant Record .This record will contain the information in the record you selected.
6. Complete and make changes to the four subscreens in the record: Household Data Entry , Certification Information , Household Members , and Household Income & Assets . *NOTE: Be sure to press the **Save** button before leaving each screen*.
7. Press **Close** when you are done. The Tenant Record will close and the changed record will be saved to a new Correction record for the unit.

Transferring a Tenant Between Units

1. If you have not already done so, select the project in the Assigned Projects screen and then select **Tenant Compliance** from the Tenant menu.
2. Find the unit by pressing the plus-sign next to the building, then press the plus-sign next to the unit to see all of the tenant records belonging to that unit.
3. Under the unit, select the most recent record of the tenant.
4. The header information for the record you selected will be displayed on the right. Press **Transfer**.



5. The **Unit Transfer** popup screen will appear. If needed, change the **Effective Date** of the transfer (it will default to today's date) and select the unit to which the tenant is moving from all currently vacant units under **Vacant Units**.
6. Press **Transfer** and then **Close**. A "Transfer-Out" record will be created for the tenant's former unit and a "Transfer-In" record will be created in the tenant's new unit.

Working with Units

Adding a Unit

1. If you have not already done so, select a project in the Assigned Projects screen and then select **Property Info** from the Property menu.
2. Select the building to which this unit belongs in the Property Info screen .
3. In the Unit View screen , press **Add New**, enter the information in the boxes, and then press **Apply Updates.**

Changing Unit Information

1. If you have not already done so, select a project in the Assigned Projects screen and then select **Property Info** from the Property menu.
2. Select the building to which this unit belongs in the Property Info screen .
3. In the Unit View screen , select the unit under **Units in Building**. Its information will be displayed at the bottom.
4. Make your changes and press **Apply Updates.**

Viewing Unit Information

1. If you have not already done so, select a project in the Assigned Projects screen and then select **Property Info** from the Property menu.

2. Select the building to which this unit belongs in the Property Info screen .
3. In the Unit View screen , select the unit under **Units in Building**. Its information will be displayed at the bottom.

Removing a Unit

1. If you have not already done so, select a project in the Assigned Projects screen and then select **Property Info** from the Property menu.
2. Select the building to which this unit belongs in the Property Info screen .
3. In the Unit View screen , select the unit under **Units in Building**. Its information will be displayed at the bottom.
4. Press **Delete Unit**.

Reports, Forms, and Submissions

Running Reports

1. You must have Adobe Acrobat Reader installed on your computer for reports to work properly. Visit http://www.adobe.com to download Adobe Acrobat Reader.
2. If you have not already done so, select a project in the Assigned Projects screen and then select **Occupancy Report** from the **Reports** menu.
3. In the Occupancy and Demographic Report screen, select a report under **Select Report Type**.
4. To run the report(s) for a report year, select **By Report Year** and choose the year from the menu. To run the report(s) for a range of dates, select **By Date Range** and enter the starting and ending dates.
5. Press the **View Report** button.
6. A new browser window will open, displaying the report in Adobe Acrobat Reader. Here you can zoom in, navigate through the pages, and send the report to a printer.

Report Types

Occupancy: For each unit in the project for the year selected, lists the head of household, move-in date, bedroom & household size, rent amounts, and household income.

Demographics: For each unit in the project for the year selected, lists the household's age / ethnicity / occupation / disability categories.

Occupancy and Demographics: For each unit in the project for the year selected, lists the head of household, move-in date, bedroom & household size, rent amounts, household income, and household's age / ethnicity / occupation / disability categories.

Screens

Log In

This area of the web site is "secured". This means that that you may exercise the options available to you for those project(s) that have been "assigned" to you by the agency. To access the secured area of the web site, you must Log In.

When you press the **Log In** button in the first screen, you are taken to the **Log in for Registered and Approved Users** screen.

Enter the **User Name** and **Password** you used when you registered. Press **Submit**.

*<u>Note</u>: The **User Name** and **Password** fields are case-sensitive, so make sure that you enter the user name and password using the same upper case/ lower case combination as entered into the registration form.)*

If the login was unsuccessful, you will see an error message. For example, your registration may not have been approved yet (see Registration).

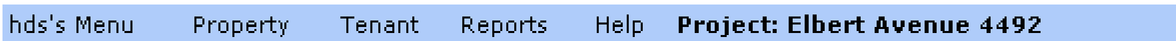
If the login was successful, the system will display the Assigned Projects screen.

You can change your password or other information by using the Profile function.

Main Menubar

Main Menubar

The Main Menubar appears at the top of the screen while you are logged into WCMS.



*If you have selected a project, its name will appear on the right and all items in the **Property**, **Tenant**, and **Reports** menus will apply to that property only. To select another property, select **My Projects** under **hds's Menu**.*

hds's Menu : Lets you select a new project, change your user information, and log out.

Property : Lets you work with the property's buildings and units, submit notices, enter statement of operations, and work with forms.

Tenant : Lets you enter/change the property's tenant records and upload tenant data.

Reports : Lets you complete and submit reports on the property.

Help: Launches online help for WCMS.

Project Name: Displays the currently-selected project to which these functions apply. To select another project, choose **My Projects** under **hds's Menu**.

Tenant Menu

The **Tenant Menu** appears in the Main Menubar whenever you select a property in the Assigned Projects screen.

You can select an item to perform that functionality for the currently opened project (displayed on the right of the menubar). To select another project, select **My Projects** under **hds's Menu**.

Tenant Compliance

Tenant Upload

HDS's Menu

HDS's Menu

The **HDS's Menu** set of dropdown functions is always available in the Main Menubar after you log in.

My Projects: Takes you to the Assigned Projects screen, where you can select a property to work with.
My Profile: Takes you to the Profile screen, where you can view or edit your personal information.
Log Out: Exits the WCMS system.

Assigned Projects

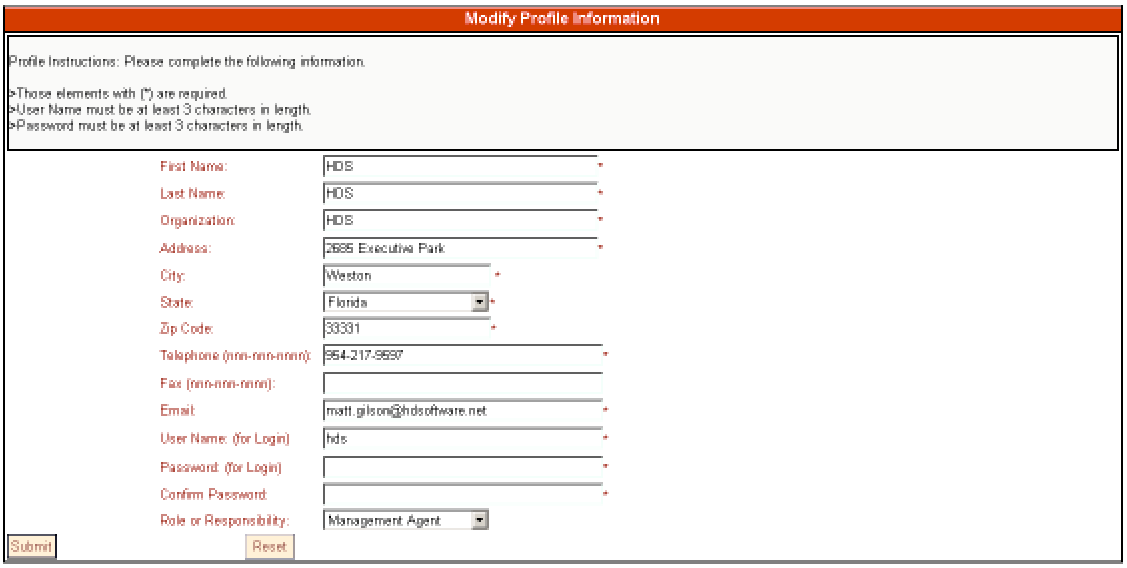
This screen lists all of the properties to which you have been assigned.

Property Number	
4492	Elbert Avenue
4127	Rose Hall I

Click on a Property Name to open the Main Menubar for that property.

Profile

This screen lets you change your logon, password, and other information at any time after you've registered. Simply log in, select **My Profile** under hds's Menu , make your changes in the **Modify Profile Information** screen, and press **Submit** at the bottom.


Modify Profile Information

Profile Instructions: Please complete the following information.

>Those elements with (*) are required.
>User Name must be at least 3 characters in length.
>Password must be at least 3 characters in length.

First Name:	HDS	*
Last Name:	HDS	*
Organization:	HDS	*
Address:	2685 Executive Park	*
City:	Weston	*
State:	Florida	*
Zip Code:	33331	*
Telephone (nnn-nnn-nnnn):	954-217-9597	*
Fax (nnn-nnn-nnnn):		
Email:	matt.gilson@hdsoftware.net	*
User Name: (for Login)	hds	*
Password: (for Login)		*
Confirm Password:		*
Role or Responsibility:	Management Agent	

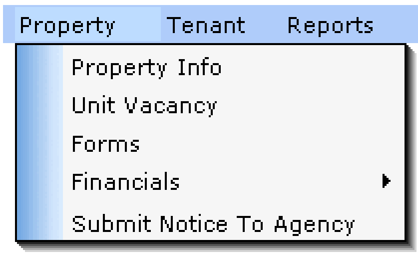
Submit Reset

First Name: User's first name. *Required.*
Last Name: User's last name. *Required.*
Organization: User's organization. *Required.*
Address: Organization's address. *Required.*
City: City where your organization is located. *Required.*
State: State where your organization is located. *Required. Select from the dropdown menu.*
Zip Code: Organization's zip code. *Required.*
Telephone: Organization's phone number. *Required.*
Fax: Organization's fax number.
Email: User's email address. *Required.*
User Name: Name used to log onto the system (must be at least 7 characters). *Required.*
Password: Password used to log onto the system (must be at least 7 characters). *Required.*
Confirm Password: Password used to log onto the system (must be same as above). *Required.*
Role or Responsibility: User's function in this system. *Required. Select from the dropdown menu.*

Property Menu

Property Menu

The **Property Menu** appears in the Main Menubar whenever you select a property in the Assigned Projects screen.



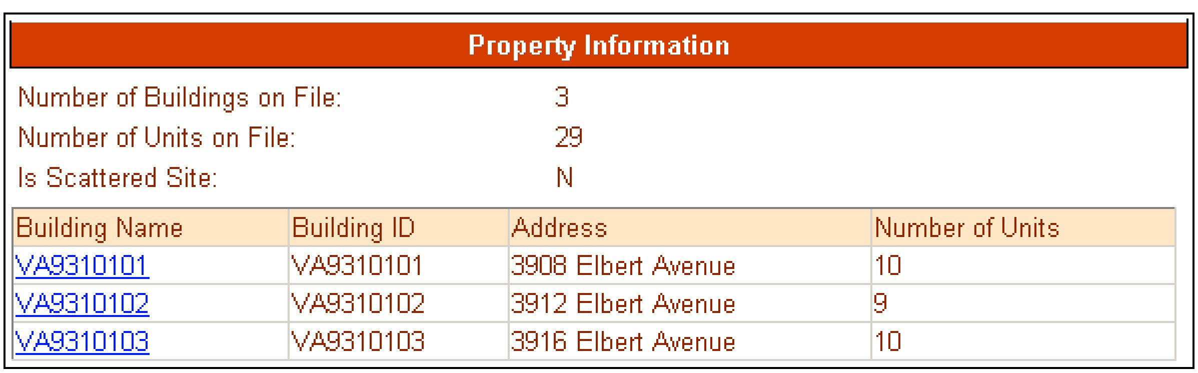
You can select an item to perform that functionality for the currently opened project (displayed on the right of the menubar). To select another project, select **My Projects** under **hds's Menu**.

Property Info
Unit Vacancy
Forms
Financials
Submit Notice to Agency

Property Info screen

This screen appears after you select a project in the Assigned Projects screen and then select **Property Info** from the Property menu .

The screen lists all of the buildings which belong to the project displayed at the top. To change projects, press the **Back to Project List** button.



Property Information

Number of Buildings on File:	3
Number of Units on File:	29
Is Scattered Site:	N

Building Name	Building ID	Address	Number of Units
VA9310101	VA9310101	3908 Elbert Avenue	10
VA9310102	VA9310102	3912 Elbert Avenue	9
VA9310103	VA9310103	3916 Elbert Avenue	10

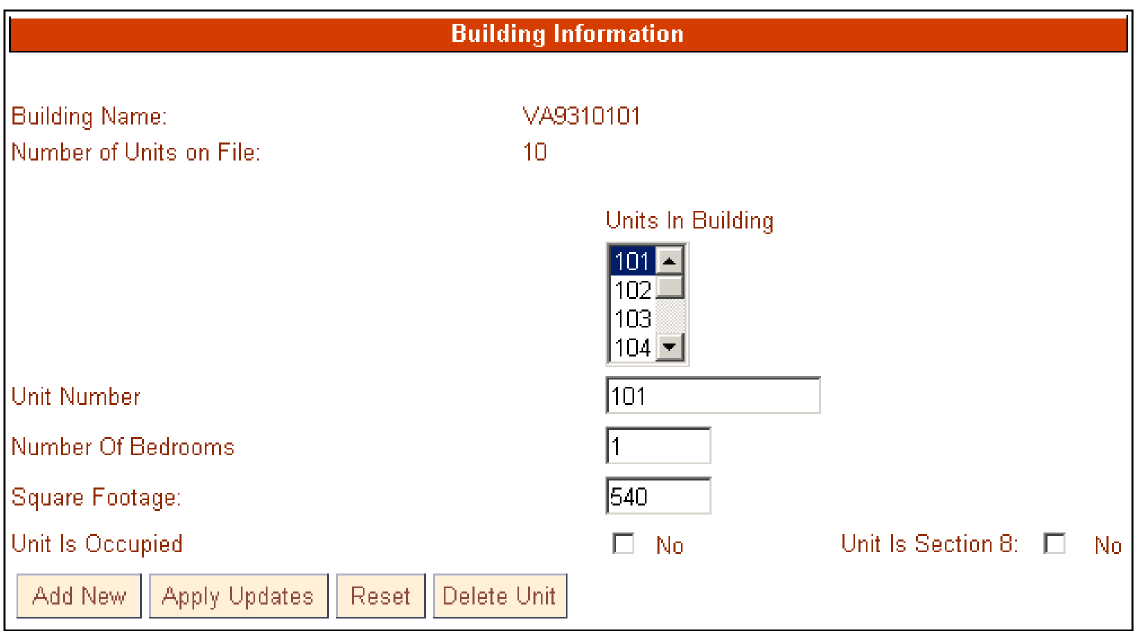
Clicking on any **Building Name** takes you to the Unit View screen , where you can add, delete, view, or change units in the building.

The fields in the **Property Info** screen are:

Number of Buildings on File: Total number of buildings in this project.
Number of Units on File: Total number of units, all buildings in this project.
Is Scattered Site: Indicates (Yes / No) whether this is a designated Scattered Site Project.
Building Name: Name given to this building in the project. Click on this field to go to the Unit View screen .
Building ID: ID number given to this building.
Address: Location of this building.
Number of Units: Total number of units currently on record for this building.

Unit View screen

This screen, which appears whenever you select a building in the Property Info screen, contains information on every unit in the building listed at the top.



To add a unit, press **Add New**, enter the information in the boxes, and then press **Apply Updates**.
To view information on a unit, select the unit under **Units in Building** and its information will be displayed.
To change unit information, select the unit under **Units in Building**, make your changes at the bottom, and press **Apply Updates**..
To remove a unit, select the unit under **Units in Building** and press **Delete Unit**.

The fields in this screen are:

Building Name: Name given to this building in the project. *Displayed by the system.*

Number of Units on File: Total number of units with current records for this building. *Displayed by the system.*

Units in Building: Listing of all units in this building, by Unit Number. *Select one to see its information below.*

Unit Number: Designated unit number containing the information below it. *Required.*

Number of Bedrooms: Bedroom size of the unit with the Unit Number above. *Required.*

Square Footage: Total square footage of the unit with the Unit Number above. *Required.*

Unit is Occupied: Indicates that the unit with the Unit Number above is currently occupied. *Check the box only if applicable.*

Unit is Section 8: Indicates that this is a Section 8 unit. *Check the box only if applicable.*

Add New: Press to add a unit to the building above.

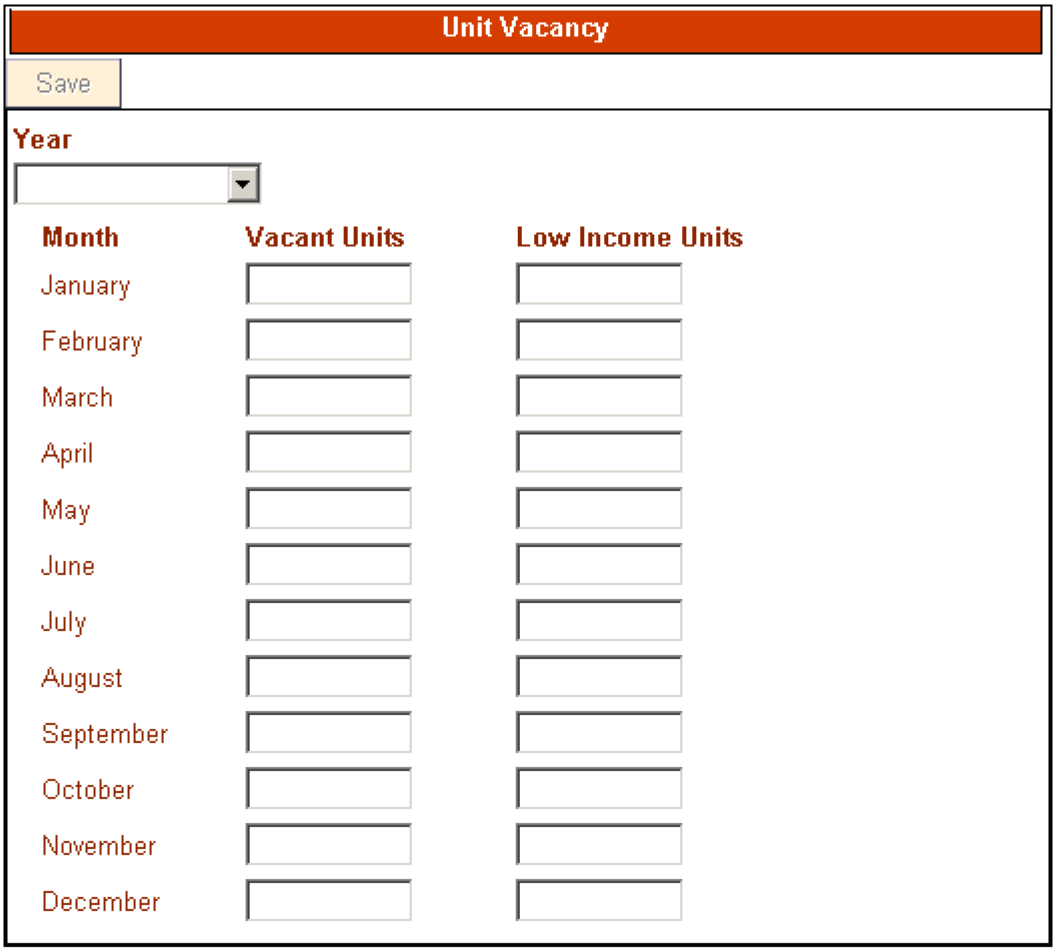
Apply Updates: Press to save your changes to the current unit.

Reset: Press to clear the fields.

Delete Unit: Press to remove the unit selected under **Units in Building**.

Unit Vacancy Reporting

The **Unit Vacancy Reporting** screen is available by selecting a project and then selecting **Unit Vacancy** from the Property menu .



This screen lets you view, record, or change the number of total and low-income vacant units for the current month (in any project for which you are assigned this functionality).

The **Month** and **Year** is displayed at the top. The total number of units in each project appears under **Unit Count**. For each project, simply enter or change a value under **Month Vacancies** and/or **Month Low Income Units** and press the **Update** button.

Standard Forms

This functionality is currently not implemented.

Statement of Operations screen

The **Statement of Operations** screen stores financial information for a property.

The screen is in three parts.

Part I includes all account items and subtotals. You enter amounts into any white fields and the display-only purple fields will be calculated whenever you press the **Calculate** button.

Part II includes Principal & Reserve amounts that you enter.

Part III is a display-only grid that summarizes all of the entered and calculated data.

Depending on how the system is configured, you may be keeping records on an annual or a monthly basis.

Entering Statement of Operations Data – Monthly

1. Select the **Fiscal Year** and **Fiscal Month** for which to record data.
2. In the **Budget** column, enter the annual budget amount for each item. In the **Amount** column, enter the actual amount for that month. In the **Audit** column, enter the annual audit amount.
3. Press the **Calculate** button. The **YTD** (year-to-date) amount, all subtotals, and any other fields appearing in purple will be calculated by the system when you do so.
4. Press the **Save** button to save this record.

Entering Statement of Operations Data -- Annually

1. Select the **Fiscal Year** for which to record data.
2. In the **Budget** column, enter the annual budget amount for each item. In the **YTD** column, enter the actual amount for the year-to-date. In the **Audit** column, enter the annual audit amount.
3. Press the **Calculate** button. All subtotals and any other fields appearing in purple will be calculated by the system when you do so.
4. Press the **Save** button to save this record.

The fields in the **Statement of Operations** screen are:

Calculate: Press this button to compute new subtotal and YTD amounts based on the date you've entered.

Preview: Press this button to prepare a Statement of Operations report that includes the currently displayed data.

Save: Save all current data to the property record.

Fiscal Year: The fiscal year of this statement of operations record (used for annual and monthly records). *Select from the dropdown menu to enter or view a record.*

Fiscal Month: The month of this statement of operations record (only appears for monthly records only). *Select from the dropdown menu to enter or view a record.*

Description of account: Description of account item that you included in the statement of operations report. If shaded, a subtotal (read-only) entry of the white entries preceding it in the listing.

Budget: The annual budget amount for the item.

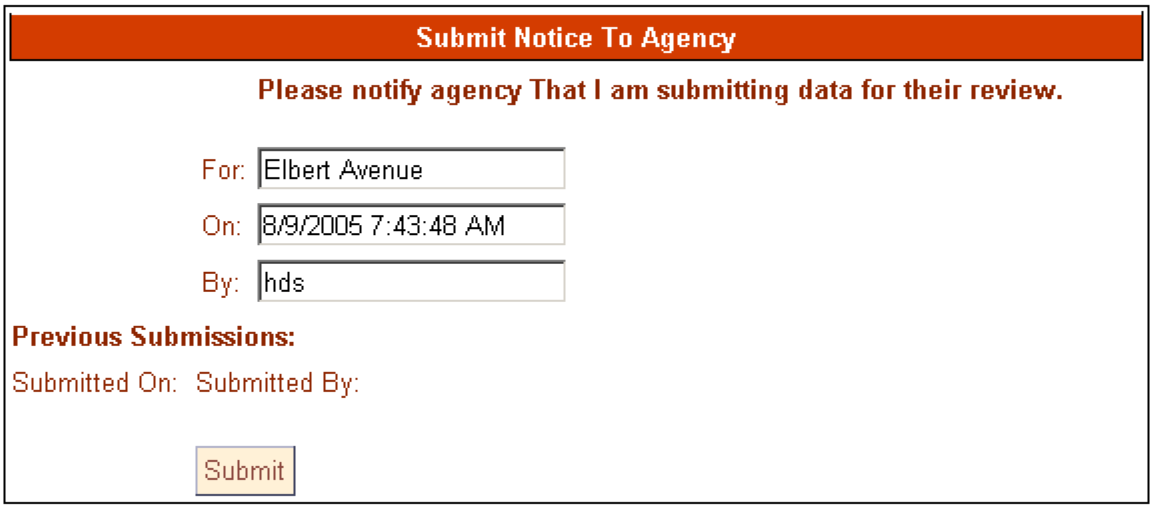
Amount: Actual monthly amount for the item (appears only in monthly records).

YTD: Amount for the selected year to date. If a monthly record, this is a read-only (purple) field.

Audit: The annual audit amount for the item.

Submit Notice to Agency

The functionality is available when you select a project from the Project List. This functionality allows you to inform the agency that you are submitting project data for their review.



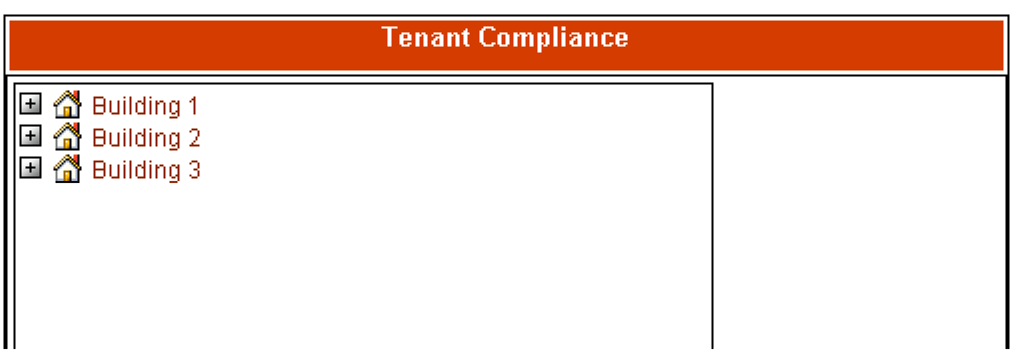
The fields in the **Submit Notice to Agency** box are:

For: The name of the project. *Displayed by the system.*
On: The date submitted. *Defaults to today's date.*
By: The party submitting the project information. *Defaults to the current logon name.*

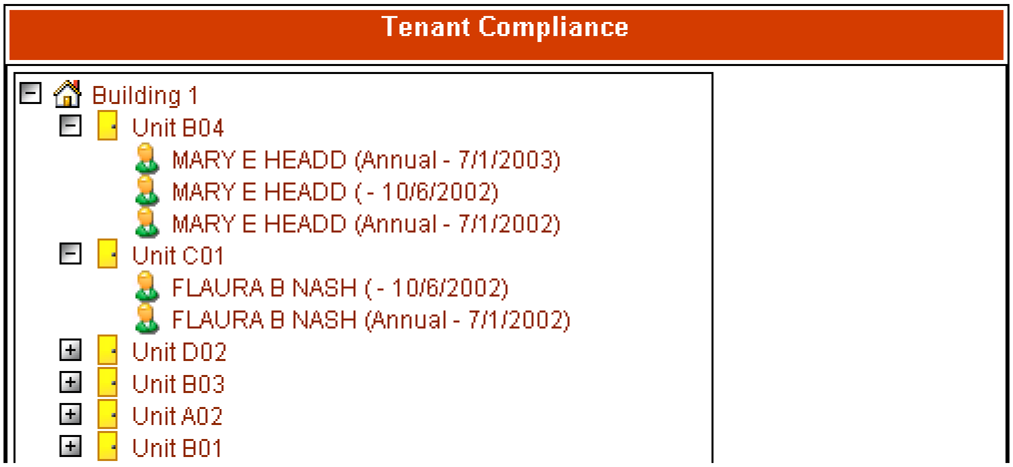
Tenant Menu

Tenant Compliance

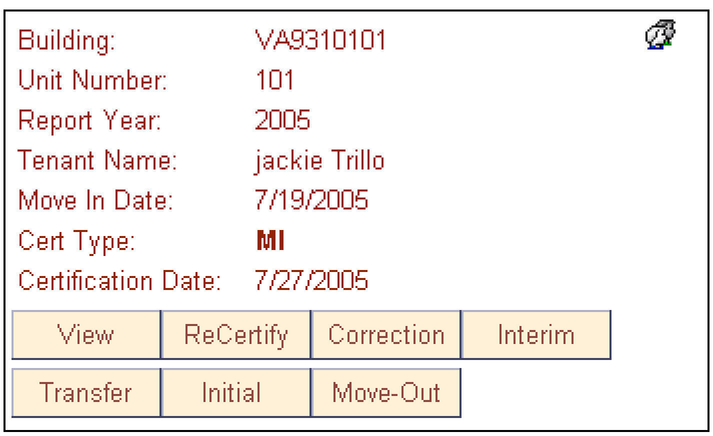
When you select **Tenant Compliance** from the Tenant menu , all of the buildings in the project will be displayed.



Click the plus-sign to the left of a building to list all of the units in the building, then click the plus-sign next to a unit to see all tenant records in that unit.



When you click on a tenant record, its basic information will appear in the box on the right, along with a set of buttons (View, Modify, Move In, etc.) enabling you to work with that record.



If the unit is vacant, a **Move-In** record will appear underneath the unit. Select this record as you would a tenant to begin recording the move-in.

When you press a button under a tenant or move-in record, another browser window will open and display the Tenant Record .

Pressing the **Refresh Building/Unit Tree** button collapses and updates the tree on the left with all of the building, unit, and tenant records for the project.

Viewing a Tenant Record
Changing a Tenant Record
Moving In a Tenant
Certifying a Tenant
Moving Out a Tenant
Submitting a Tenant Correction
Transferring a Tenant Between Units

Tenant Records

The complete tenant record is launched in a new browser instance whenever you press a button under the tenant's header record in the Tenant Compliance screen.

The tenant record consists of a set of four screens, each accessible by pressing the buttons at the top of the screen.

IMPORTANT NOTE: When entering or modifying information, press the ***Save*** *button at the bottom before moving from one screen to another.*

Household Data Entry subscreen
Certification Information subscreen
Household Members subscreen
Household Income & Assets subscreen

Household Data Entry subscreen

The **Household Data Entry** subscreen is part of a Tenant Record , launched by pressing the **Household Data Entry** button at the top of the screen.

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

IMPORTANT NOTE: When entering or modifying information, press the ***Save*** *button at the bottom before moving from one screen to another.*

The fields in the **Household Data Entry** subscreen are:

Report Year: Report year to which this record belongs. *Displayed by the system.*
Building BIN: Identification number of the building to which this record belongs. *Displayed by the system.*
Unit: Unit to which this record belongs. *Displayed by the system.*

Bedroom Size: Bedroom size of this unit. *Displayed by the system.*

Certification Type: If this record is a certification, the type of certification. *Displayed by the system.*

Action Type: If this record is not a certification, the type of record. *Displayed by the system.*

Move-In Date: Date this tenant moved in. *Select a date from the dropdown calendar.*

Effective Date: Effective date of this record. *Select a date from the dropdown calendar.*

First Name: First name of the unit's current tenant (head of household).

MI: Middle initial of the unit's current tenant (head of household).

Last Name: Last name of the unit's current tenant (head of household).

Contract Rent: Monthly contract rent for this unit.

Utility: Monthly utility allowance for this unit.

Calculated # of Family Members: Number of family members in this household. *Displayed by the system (from the Household Members subscreen).*

Calculated Household Income: Tenant's total annual household income. *Displayed by the system (from the Household Income & Assets subscreen).*

Entered Date: Date this record was entered. *Displayed by the system.*

Entered By: Name of the WCMS user who entered this record. *Displayed by the system.*

The buttons at the bottom are:

Save: Save all of the information currently in this screen to the tenant record.

Close: Close this tenant record.

Certification Information subscreen

The **Certification Information** subscreen is part of a Tenant Record , launched by pressing the **Certification Information** button at the top of the screen.

The screen contains demographic and other certification category information.

*IMPORTANT NOTE: When entering or modifying information, press the **Save** button at the bottom before moving from one screen to another.*

The fields in the **Certification Information** subscreen are:

Report Year: Report year to which this record belongs. *Displayed by the system.*

Building BIN: Identification number of the building to which this record belongs. *Displayed by the system.*

Unit: Unit to which this record belongs. *Displayed by the system.*

Bedroom Size: Bedroom size of this unit. *Displayed by the system.*

Head of Household: Full name of the tenant's head of household. *Displayed by the system.*

Owner Income Designation: Owner-reported income classification of this unit. *Select from the dropdown menu.*

Owner Rent Designation: Owner-reported rent classification of this unit. *Required. Select from the dropdown menu.*

Subsidy Type: Type of subsidy for this tenant, if any. *Select 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. *Check the box only if applicable.*

Number of Full-Time Students: The number of full-time students in this household. *Displayed according* *to information entered in the Household Members screen.*

Household Race: Racial designation of this household. *Select from the dropdown menu.*

HOME Tenant: Indicates that this is a HOME tenant. *Check the box only if applicable.*

Head of Household?: Gender of the tenant's head of household. *Select from the dropdown menu.*

Homeless Prior?: Indicates that the tenant was homeless directly prior to moving into this unit. *Check the box only if applicable.*

Social Services: Social services, if any, provided to the tenant household. *Select from the dropdown menu.*

Handicapped: Indicates that a person designated as handicapped is a member of the household. *Check the box only if applicable.*

HH Age At Cert: Head of household's age at the time of this record's Effective Date. *Displayed by the system.*

-- Demographic Information --

Head of Household Primary Source of Income: The primary source of income in the tenant's household. *Select from the dropdown menu.*

Head of Household Occupation: The head of household's occupation. *Select from the dropdown menu.*

Number of Occupants over 62: Total number of persons over age 62 currently in the household.

Number of Adults with Income: Total number of adult residents in the household with income. *Displayed by the system.*

Is this a Single Parent Household?: Indicates that this household is a single-parent family. *Check the box only if applicable.*

Number of Dependents Under 18: Total number of persons under age 18 currently in the household. *Displayed by the system.*

The buttons at the bottom are:

Save: Save all of the information currently in this screen to the tenant record.

Close: Close this tenant record.

Household Members subscreen

The **Household Members** subscreen is part of a Tenant Record , launched by pressing the **Household Members** button at the top of the screen.

The **Household Members** screen contains information on all members of the tenant's household. Each member of the household appears as a line-item in the grid.

The head of household automatically appears on the first line with information from the other subscreens.

Add a household member by pressing the **Add** button below the grid and completing the fields.

Change information by clicking directly inside a field and entering/selecting the new information.

*IMPORTANT NOTE: When entering or modifying information, press the **Save** button at the bottom before moving from one screen to another.*

The header information at the top displays:

Report Year: Report year to which this record belongs. *Displayed by the system.*

Building BIN: Identification number of the building to which this record belongs. *Displayed by the* *system.*

Unit: Unit to which this record belongs. *Displayed by the system.*

Bedroom Size: Bedroom size of this unit. *Displayed by the system.*

Head of Household: Full name of the tenant's head of household. *Displayed by the system.*

The fields in the **Members** grid are:

Social Security: Social Security Number of this household member.

Last Name: Household member's last name.

First Name: Household member's first name.

Middle Initial: Household member's middle initial.

Relationship: Relationship of this household member to the head of household (HUD category). *Select from the dropdown menu.*

Gender: Gender of this household member. *Select from the dropdown menu.*

Birthdate: Household member's birthdate. *Select a date from the pop-up calendar.*

Age at Cert: Household member's age, in years, at the time of this certification.

Special Status: Special status, if any, of this household member (HUD category). *See the legend at the bottom of the screen.*

Alien Reg. Number: Household member's 10-digit alien registration number, if applicable.

Race: Race designation of this household member. *Select from the dropdown menu.*

Ethnicity: Ethnic category of this household member. *Select from the dropdown menu.*

The buttons at the bottom are:

Save: Save all of the information currently in this screen to the tenant record.

Close: Close this tenant record.

Household Income & Assets subscreen

The **Household Income & Assets** subscreen is part of a Tenant Record , launched by pressing the **Household Income & Assets** button at the top of the screen.

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

Add an item to a grid by pressing the **Add** button below the grid and completing the fields.

Change information by clicking directly inside a field and entering/selecting the new information.

*IMPORTANT NOTE: When entering or modifying information, press the **Save** button at the bottom before moving from one screen to another.*

The header information at the top displays:

Report Year: Report year to which this record belongs. *Displayed by the system.*

Building BIN: Identification number of the building to which this record belongs. *Displayed by the system.*

Unit: Unit to which this record belongs. *Displayed by the system.*

Bedroom Size: Bedroom size of this unit. *Displayed by the system.*

Head of Household: Full name of the tenant's head of household. *Displayed by the system.*

The fields in the **Household Assets** grid are:

Asset Type: The type of this asset. *Select from the dropdown menu.*

Asset Status: Current status of this asset. Select from: "Current" = currently owned by the household, "Imputed" = disposed of within the last 24 months. *Select from the dropdown menu.*

Cash Value: Current cash value of this asset.

Annual Income: Annual interest income from this asset.

The fields displayed in the **Asset Summary** grid are:

Imputed Asset Income: Total imputed asset income for the household.

Asset Income: Total asset income for the household.

The fields in the **Household Income** grid are:

Member Name: Household member to which this income item belongs. *Select from the household members entered in the Household Members subscreen.*

Income Type: Type (HUD category) of this income item. *Select from the dropdown menu.*

Amount: Amount of annual income this household member receives or expects from this income type.

The fields displayed in the **Income Summary** grid are:

Non-Asset Income: Total of all entries in the Amount column. *Displayed by the system.*

Annual Income: (Asset Income) + (Non-Asset Income). *Displayed by the system.*

The fields in the **Household Deductions** grid are:

Member Name: Household member to which this deduction applies. *Select from the household members entered in the Household Members subscreen.*

Deduction Type: Type of deduction.

Amount: Amount of this deduction.

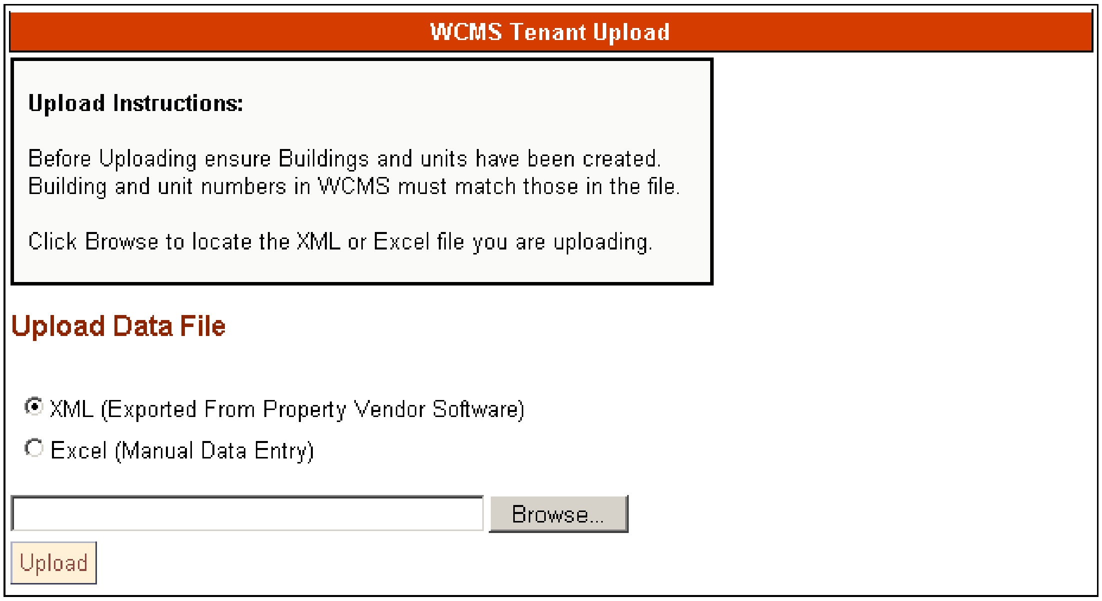
The buttons at the bottom are:

Save: Save all of the information currently in this screen to the tenant record.

Close: Close this tenant record.

Upload Tenant Data

The **WCMS Tenant Upload** screen appears when you select a project and then select **Tenant Upload** from the Tenant menu . This functionality allows you to bring in tenant data from a XML: or Excel file.



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

To upload, simply:

1. Select the type of file (**XML** or **Excel**).
2. Press the **Browse** button to locate the file on your computer.
3. Press the **Upload** button.

Consult HDS for the required format of each of these files.

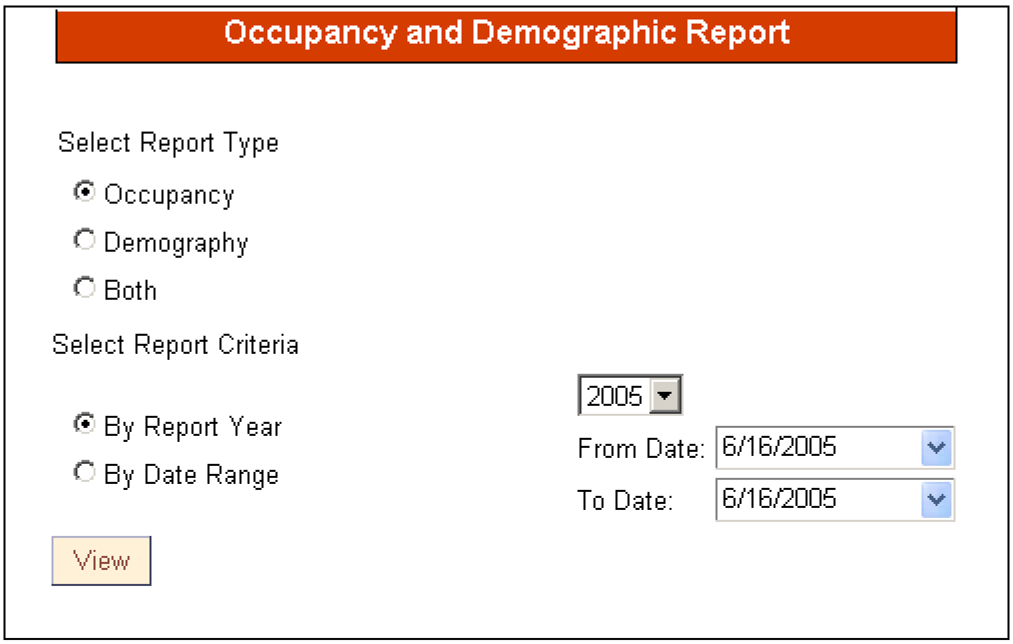
Reports

Occupancy and Demographic Report

This screen, displayed when you select **Occupancy Report** from the **Reports** menu, lets you run an Occupancy and Demographic Report on the project you selected.

To change projects, press the **Your Projects** button, make your selection, and return to this screen.

Adobe Acrobat Reader must be installed on your computer for this feature to work properly.



Running Reports

Select Report Type: Use the radio buttons to select which report(s) you want to run (Occupancy Report, Demographics Report, or both).

Select Report Criteria: Use the radio buttons to run the report(s) by either Report Year or Date Range.

By Report Year: If you select this option, choose the report year of the information to include in the report(s).

By Date Range: If you select this option, enter the starting date (**From Date**, MM/DD/YY) and ending date (**To Date**, MM/DD/YY) of the information to include in the report(s).

View Report: Press this button to run the selected report(s). This will launch a preview of the report in Acrobat Reader, from which you can view and print.