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# HDS Web Compliance Management System (WCMS) User's Guide

Version 6

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**Virginia Housing Development Authority**

601 South Belvidere Street · Richmond, Virginia 23220-6505 · (804) 782-1986

# **HDS WEB COMPLIANCE MANAGEMENT SYSTEM (WCMS) USER'S GUIDE**

**June 18, 2010**

**Version 6**

**Virginia Housing Development Authority  
601 S. Belvidere Street  
Richmond, Virginia 23320-6505**

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## Introduction

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<b>Overview</b>	The Web Compliance Management System (WCMS) allows property managers to enter tenant information directly into a web-based compliance reporting system. The information is immediately uploaded to VHDA's Housing and Development Software (HDS) database.
<b>About WCMS</b>	WCMS users log in via a web browser where they can access the properties that VHDA has approved for their use. WCMS provides access to all properties, buildings, and units. This enables users to view or edit units and enter tenant certification information. WCMS also enables users to view and print tenant certifications and occupancy and demographic reports.
<b>About this Document</b>	This document details the procedures that Property Management staff will follow for entering tenant information required for compliance.
<b>Related Documentation</b>	For additional information, refer to the <i>Web Compliance Management System User's Guide</i> , authored by HDS, available through the <b>Help</b> option on the menu bar.

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## Getting Started

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### Overview

To begin using WCMS, you must first submit an electronic request to VHDA for a user account, which will enable you to work with the properties assigned to you. When VHDA approves your account request, you will be able to log in to WCMS with your user name and password. This section contains the following topics to help you get started.



<b>Topic</b>	<b>See Page</b>
Accessing WCMS	3
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## Accessing WCMS

**Overview** WCMS is accessible through any PC web browser. In order to access your assigned projects and begin working with WCMS, you must complete an online registration form and submit it to VHDA for approval. You will receive an email notification when your request has been approved. After you are approved, you will be able to log in to the secured area of the system and work with projects to which you have been granted access.

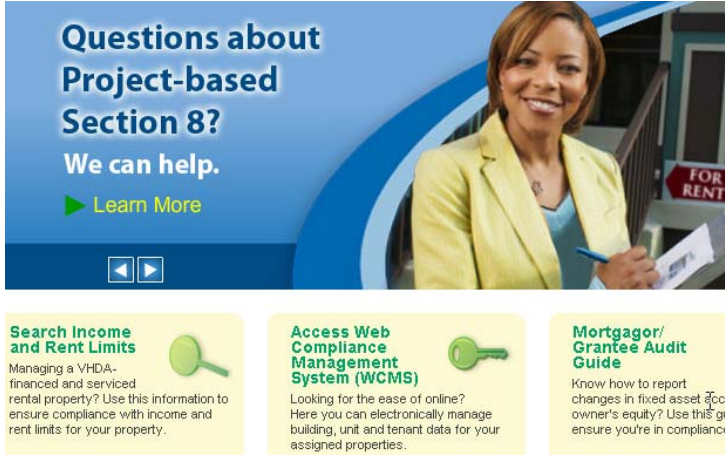
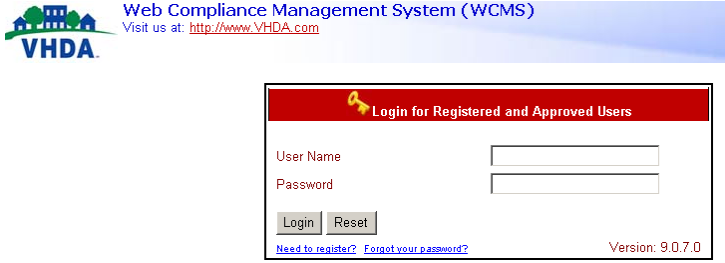
**Procedure** Complete these steps to access WCMS.

Step	Action
1	Connect to the internet and open your browser. (This procedure will depend on the type of Internet connection you use and your browser software.)
2	Use your browser to navigate to <a href="http://www.vhda.com">www.vhda.com</a> 
3	The VHDA home page appears. Click the <b>Business Partners</b> link and it will take you to the screen below. Click on <b>Property Owners &amp; Managers</b> link. 

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## Accessing WCMS, Continued

Procedure (continued)

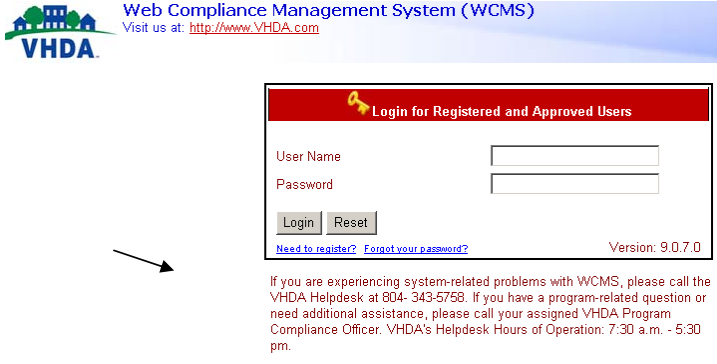
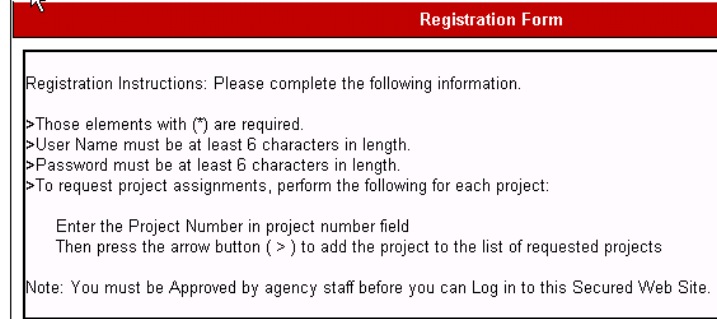
Step	Action
4	<p>Click the <b>Access Web Compliance Management System (WCMS)</b> link on this screen.</p> 
5	<p>The <b>Log in</b> window for WCMS will appear. Messages from VHDA will appear at the bottom of the screen.</p>  <p>If you are experiencing system-related problems with WCMS, please call the VHDA Helpdesk at 804-343-6758. If you have a program-related question or need additional assistance, please call your assigned VHDA Program Compliance Officer. VHDA's Helpdesk Hours of Operation: 7:30 a.m. - 5:30 pm.</p>



## Requesting a WCMS Account

**Overview** In order to access WCMS, you must first request and be approved for a user account. Each person in your organization will need his or her own account in order to work with his or her assigned projects. You **must** select your own unique user name and password that is at least 6 characters long.

**Procedure** Follow the registration process below to request a user account.

Step	Action
1	Open WCMS as detailed in "Accessing WCMS" on page 3.
2	<p>Click <a href="#">Need to Register?</a> to access the <b>Registration</b> link on the <b>Log in</b> window.</p>  <p>If you are experiencing system-related problems with WCMS, please call the VHDA Helpdesk at 804- 343-5758. If you have a program-related question or need additional assistance, please call your assigned VHDA Program Compliance Officer. VHDA's Helpdesk Hours of Operation: 7:30 a.m. - 5:30 pm.</p>
3	<p>The <b>Registration</b> window displays instructions and fields for entering your account information.</p> 

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## Requesting a WCMS Account, Continued

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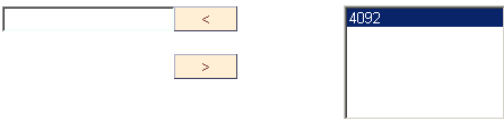

### Procedure (continued)

Step	Action
4	<p>Use the guidelines in the registration instructions at the top of the screen to enter the following information about yourself:</p> <ul style="list-style-type: none"><li>• name</li><li>• organization</li><li>• address and telephone number</li><li>• fax number (optional)</li><li>• email address</li><li>• user name (this is the name you will use to log in to WCMS) If someone already has that user name, you will be prompted to choose another.</li><li>• password (this is the password assigned to the user name you created)</li></ul> <p><b>Note:</b> Make a note of the upper case/lower case combination that you enter in the <b>User Name</b> and <b>Password</b> fields on the registration form; you will need to enter them the same way when you log in to WCMS later.</p>
5	Type your password a second time in the <b>Confirm Password</b> field.
6	From the dropdown, select a role that most closely resembles your role with the property.
7	<p>Now you may add the property(s) for which you are responsible by entering the VHDA property number. If you do not have this number, we will contact you after registration to obtain your property assignments.</p> <p><b>Note:</b> You only have to register once, even if you are assigned to other properties later. If you need to add other properties in the future and you have already registered, notify your VHDA Program Compliance Officer and the new property(s) will be added for you.</p>

*Continued on next page*

## Requesting a WCMS Account, Continued

### Procedure (continued)

Step	Action
8	<p>If you know the Project Number(s) of the project(s) assigned to you, enter it in the <b>Project Number</b> field and then click the right-arrow to add it to the <b>Projects List</b> on the right. You do not need to add a project in order to submit your request.</p> <p>Projects: (Enter as many as needed.) Project Number(Optional):</p> 
9	<p>If you need to remove a project, highlight it in the list and click the left-arrow to remove it from the list and display it in the <b>Projects</b> field. Then use the <b>Delete</b> key on the keyboard to remove it from the list.</p>
10	<p>When you finish entering your information, click <b>Submit</b> at the bottom of the screen to submit the request to VHDA.</p>  <p>(Note: Clicking <b>Reset</b> will remove all of the information you entered on the screen.)</p>

*Continued on next page*

## Requesting a WCMS Account, Continued

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### Procedure (continued)

Step	Action
11	<p>Your registration request is submitted to VHDA for approval. A confirmation window shows the information you entered.</p> <div data-bbox="472 468 1170 831" style="border: 1px solid black; padding: 10px;"><p style="text-align: center; background-color: #c00000; color: white; margin: 0;"><b>Pending Approval</b></p><p style="color: #c00000; margin: 5px 0;">Thank you for submitting your registration. Once your registration has been approved you will be able to login.</p><p style="margin: 5px 0;">First Name: Mary</p><p style="margin: 5px 0;">Last Name: Sample</p><p style="margin: 5px 0;">User Name: SampleGirl</p><p style="margin: 5px 0;">Email: Sample@sampleproperty.com</p><p style="margin: 5px 0;"><a href="#">Back To Login</a></p></div>
12	<p>Make a note of the user name and password that you have selected. You will need them to log in after you receive approval from VHDA.</p>
13	<p>Our VHDA staff will set-up your account and email you when it has been completed. Once you receive this email message indicating that your registration has been approved, you will be able to log in to WCMS and begin working with your assigned properties.</p>

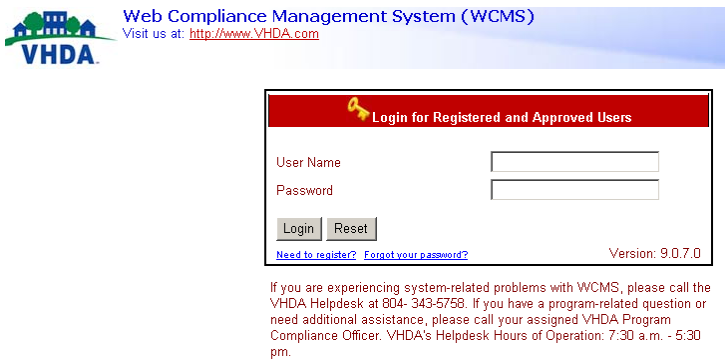
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## Logging In

**Overview** Registered users can access WCMS by logging in with their WCMS user name and password. If you have not registered, refer to “

**Requesting a WCMS Account**  
on page 5.

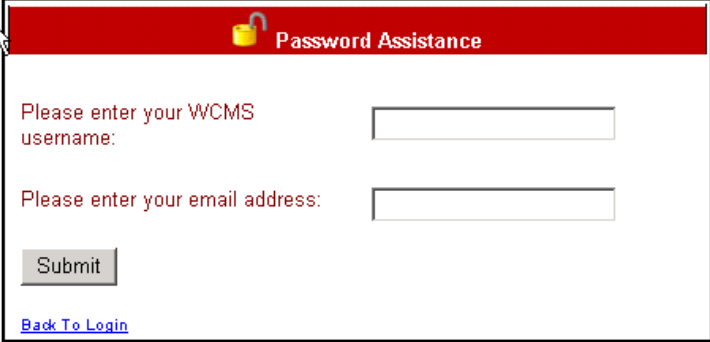
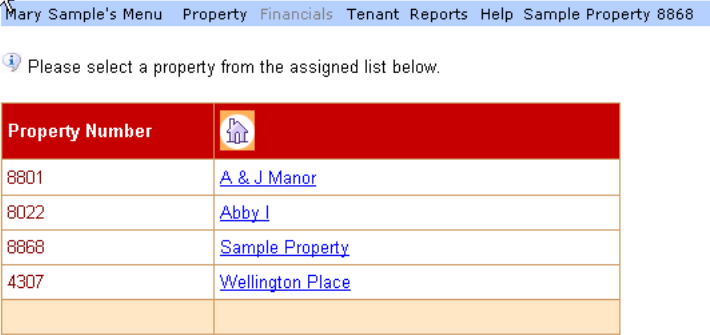



**Procedure** Complete these steps to log in to WCMS.

Step	Action
1	Open Internet Explorer and navigate to the WCMS application (refer to “Accessing WCMS” on page 3.)
2	<p>The <b>Log in</b> window will display. Enter your user name and password and then click <b>Login</b>.</p>  <p><b>Note:</b> These fields are case-sensitive, so make sure that you enter the user name and password using the same upper case/ lower case combination that you entered on the registration form.</p>

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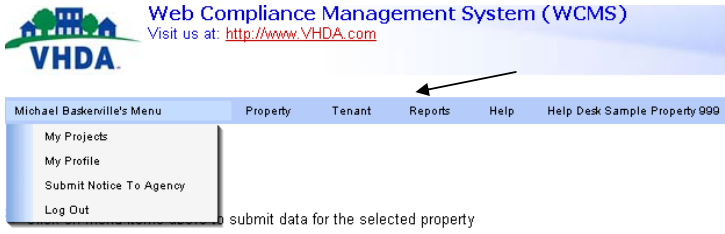

## Logging In, Continued

Procedure (continued)

Step	Action												
3	<p>If you forget your password, click <b>Forgot your Password?</b> and Password Assistance will open.</p> <div data-bbox="464 390 1170 730" style="border: 1px solid black; padding: 5px;">  <p>The screenshot shows a red header bar with a yellow padlock icon and the text "Password Assistance". Below the header, there are two text input fields. The first is labeled "Please enter your WCMS username:" and the second is labeled "Please enter your email address:". Below the email field is a "Submit" button and a blue link labeled "Back To Login".</p> </div> <p>Enter your user name and email address. This email address must be the same as in your profile. A temporary password will be mailed to the email address listed on your profile. Once you have logged in to WCMS, go to My Profile and change your password.</p> <p>If you forget your user name, <b>Do not re-register</b>. Contact your Program Compliance Officer for assistance.</p>												
4	<p>The <b>Assigned Properties</b> screen displays the name and number of each property to which you have been granted access.</p> <div data-bbox="464 1045 1170 1377" style="border: 1px solid black; padding: 5px;">  <p>The screenshot shows a navigation menu at the top with items: "Mary Sample's Menu", "Property", "Financials", "Tenant Reports", "Help", and "Sample Property 8868". Below the menu is a message: "Please select a property from the assigned list below." Below this message is a table with two columns: "Property Number" and a column with a house icon and a link to the property name.</p> <table border="1" data-bbox="464 1146 1079 1377"> <thead> <tr> <th data-bbox="464 1146 675 1199">Property Number</th> <th data-bbox="675 1146 1079 1199"></th> </tr> </thead> <tbody> <tr> <td data-bbox="464 1199 675 1236">8801</td> <td data-bbox="675 1199 1079 1236"><a href="#">A &amp; J Manor</a></td> </tr> <tr> <td data-bbox="464 1236 675 1274">8022</td> <td data-bbox="675 1236 1079 1274"><a href="#">Abby I</a></td> </tr> <tr> <td data-bbox="464 1274 675 1312">8868</td> <td data-bbox="675 1274 1079 1312"><a href="#">Sample Property</a></td> </tr> <tr> <td data-bbox="464 1312 675 1350">4307</td> <td data-bbox="675 1312 1079 1350"><a href="#">Wellington Place</a></td> </tr> <tr> <td data-bbox="464 1350 675 1377"></td> <td data-bbox="675 1350 1079 1377"></td> </tr> </tbody> </table> </div>	Property Number		8801	<a href="#">A &amp; J Manor</a>	8022	<a href="#">Abby I</a>	8868	<a href="#">Sample Property</a>	4307	<a href="#">Wellington Place</a>		
Property Number													
8801	<a href="#">A &amp; J Manor</a>												
8022	<a href="#">Abby I</a>												
8868	<a href="#">Sample Property</a>												
4307	<a href="#">Wellington Place</a>												

## Logging Out

**Procedure** Complete these steps to log out of WCMS.

Step	Action
1	<p>Click on the user's menu and then click <b>Log Out</b>.</p> 
2	<p>The <b>Log Out</b> screen will appear. Click <b>Log Out</b> to end your session. Clicking <b>Cancel</b> will return you to your Assigned Property Screen.</p> 
3	<p>The <b>Login</b> window will display. Click the "X" in the upper right corner of the window to close Internet Explorer.</p>

## Navigating

### Overview


WCMS provides menus and links for easy navigation through the system. The menu bar at the top of the screen provides options for performing the following tasks:

- viewing and working with your user account
- managing building, unit and tenant data for your assigned properties
- working with reports

### Menu Bar

When you log in, the system will display your assigned property list. You must click on a property name to access the property specific menu features.

Formatted: Bullets and Numbering

Property Number	
8801	<a href="#">A &amp; J Manor</a>
8022	<a href="#">Abby I</a>
8868	<a href="#">Sample Property</a>
4307	<a href="#">Wellington Place</a>

The menu bar also displays the user's menu, which displays your Profile Name. Options on the user's menu allow you to return to or refresh the list of your assigned projects, view and modify your profile and log out.



Web Compliance Management System (WCMS)  
Visit us at: <http://www.VHDA.com>

Michael Baskerville's Menu    Property    Tenant    Reports    Help    Help Desk Sample Property 999

My Projects  
My Profile  
Submit Notice To Agency  
Log Out

submit data for the selected property

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## Navigating, Continued

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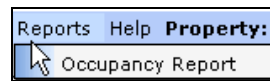
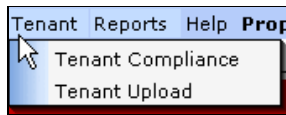
### Menu Bar (continued)

After selecting a property, other options will be available.

- The Property menu provides options for working with properties such as reviewing buildings, unit setup and access to VHDA forms (**NOTE:** There are no VHDA forms available from this menu option at this time). The name of the currently selected project displays on the far right side of the menu bar.



- The Tenant menu provides access to Tenant Compliance information and allows you to upload tenant data from a compatible system if you have been given this security right. If you have been given security rights to upload tenant data via an xml file upload, the Tenant Upload feature will be available; otherwise that feature will be grayed out. **NOTE:** The property's project number, BIN and unit numbers must be identical to what is in VHDA's database in order for the xml file to upload successfully.
- The Reports menu allows you to generate occupancy and demographic reports.



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## Navigating, Continued

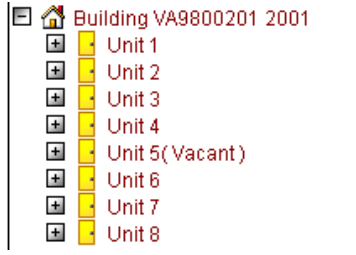
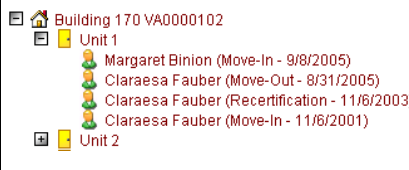
### Navigating Tenant Compliance

The **Tenant Compliance** screen (accessed by clicking **Tenant Compliance** on the Tenant menu) lists building, unit, and tenant information in a tree structure, which can be expanded to view more information.

Mary Sample's Menu Property Financials Tenant Reports Help Sample Property 8868

**Tenant Compliance**

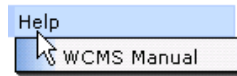
- [-] [+] [house icon] Building VA9800012 2002
- [-] [house icon] Building VA9800201 2001
  - [+] [unit icon] Unit 1
  - [+] [unit icon] Unit 2
  - [+] [unit icon] Unit 3
  - [+] [unit icon] Unit 4
  - [+] [unit icon] Unit 5(Vacant)
  - [+] [unit icon] Unit 6
  - [+] [unit icon] Unit 7
  - [+] [unit icon] Unit 8

<p>Click the plus sign  next to a building to view the units belonging to the building.</p>	
<p>Click the plus sign next to a unit to view the tenant certifications for the unit.</p> <p>Click the minus sign  to collapse the tree.</p>	

## Getting Help

### WCMS User's Guide

Additional help is available in the *WCMS User's Guide*, authored by Housing and Development Software. The **Help** menu contains a link to a .PDF version of this document. You must have Adobe® Acrobat® Reader installed on your computer in order to view or print a .PDF file. Visit <http://www.adobe.com> to download Adobe Acrobat Reader or see your system administrator for more information.



## Viewing Property Information



### Assigned Properties

When you log into WCMS, the **Assigned Properties** screen appears. It lists the name and VHDA number of all properties assigned to you. Click on a property name and then select **Property Info** from the Property menu to view building information for the property.

**Tip:** You can always return to this screen by clicking the **My Projects** option on the user's menu.

### Procedure

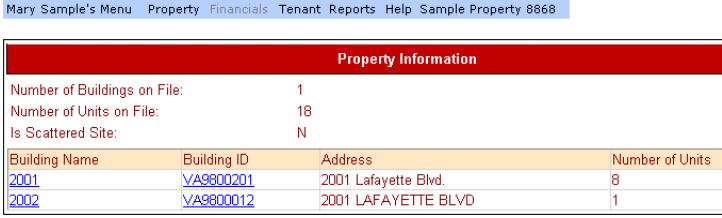
Complete these steps to view your assigned properties.

Step	Action												
1	<p>Log in to WCMS with your user name and password. The <b>Assigned Properties</b> screen appears.</p>  <table border="1"> <thead> <tr> <th>Property Number</th> <th></th> </tr> </thead> <tbody> <tr> <td>8801</td> <td><a href="#">A &amp; J Manor</a></td> </tr> <tr> <td>8022</td> <td><a href="#">Abby I</a></td> </tr> <tr> <td>8868</td> <td><a href="#">Sample Property</a></td> </tr> <tr> <td>4307</td> <td><a href="#">Wellington Place</a></td> </tr> <tr> <td></td> <td></td> </tr> </tbody> </table>	Property Number		8801	<a href="#">A &amp; J Manor</a>	8022	<a href="#">Abby I</a>	8868	<a href="#">Sample Property</a>	4307	<a href="#">Wellington Place</a>		
Property Number													
8801	<a href="#">A &amp; J Manor</a>												
8022	<a href="#">Abby I</a>												
8868	<a href="#">Sample Property</a>												
4307	<a href="#">Wellington Place</a>												
2	<p>Click on a property link. The name displays on the menu bar.</p>  <p>Mary Sample's Menu   Property   Financials   Tenant Reports   Help   Sample Property 8868</p>												

*Continued on next page*

## Viewing Property Information, Continued

Procedure (continued)

Step	Action												
3	Click the property name in the menu bar or click <b>Property Info</b> on the <b>Property</b> menu.												
4	<p>The <b>Property Information</b> screen displays, for the selected property, a summary indicating the total number of buildings and units on file and whether the buildings are located in scattered sites. Following the summary is a listing of each building, including the name, building ID (or BIN number for TC), address, and number of units. The building name is a link to unit detail information.</p> <p>All of the information on this screen originates in VHDA systems. If you would like to request any changes, contact your VHDA Program Compliance Officer.</p>  <p>The screenshot shows a navigation menu at the top: "Mary Sample's Menu", "Property", "Financials", "Tenant", "Reports", "Help", and "Sample Property 8868". Below the menu is a red header "Property Information". The summary section displays: "Number of Buildings on File: 1", "Number of Units on File: 18", and "Is Scattered Site: N". Below this is a table with columns: "Building Name", "Building ID", "Address", and "Number of Units".</p> <table border="1" data-bbox="459 953 1177 1024"> <thead> <tr> <th>Building Name</th> <th>Building ID</th> <th>Address</th> <th>Number of Units</th> </tr> </thead> <tbody> <tr> <td><a href="#">2001</a></td> <td><a href="#">VA9800201</a></td> <td>2001 Lafayette Blvd.</td> <td>8</td> </tr> <tr> <td><a href="#">2002</a></td> <td><a href="#">VA9800012</a></td> <td>2001 LAFAYETTE BLVD</td> <td>1</td> </tr> </tbody> </table>	Building Name	Building ID	Address	Number of Units	<a href="#">2001</a>	<a href="#">VA9800201</a>	2001 Lafayette Blvd.	8	<a href="#">2002</a>	<a href="#">VA9800012</a>	2001 LAFAYETTE BLVD	1
Building Name	Building ID	Address	Number of Units										
<a href="#">2001</a>	<a href="#">VA9800201</a>	2001 Lafayette Blvd.	8										
<a href="#">2002</a>	<a href="#">VA9800012</a>	2001 LAFAYETTE BLVD	1										
5	To switch to another project, click <b>My Projects</b> on the user's menu and then choose from the <b>Assigned Projects</b> list.												

## Working with Units

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### Overview

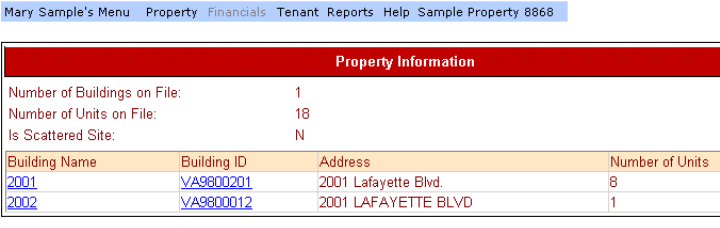
This section contains the following topics.

<b>Topic</b>	<b>See Page</b>
Viewing Building Information	19
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## Viewing Building Information

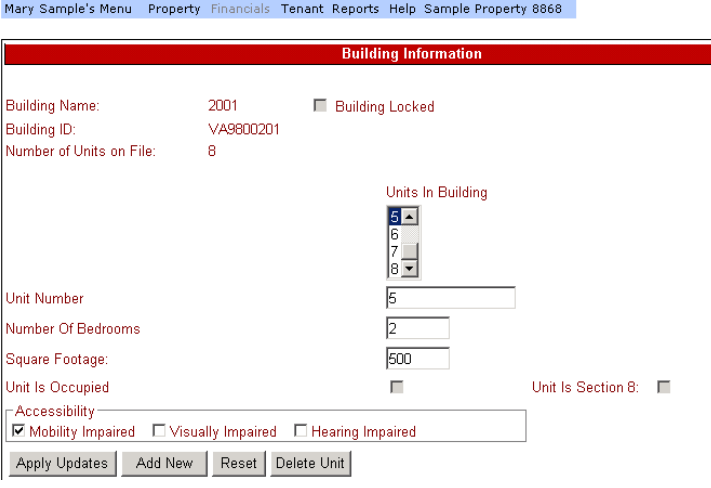
**Procedure** Complete these steps to view building information.

Step	Action												
1	Select a project and then click the <b>Property Info</b> link on the <b>Property</b> menu. The <b>Property Information</b> screen appears.												
2	Click on the building in the Building Name or Building ID column to view building's unit information.   <p>The screenshot shows a navigation menu at the top: "Mary Sample's Menu", "Property", "Financials", "Tenant", "Reports", "Help", and "Sample Property 8868". Below this is a red header for "Property Information". The main content area displays summary statistics: "Number of Buildings on File: 1", "Number of Units on File: 18", and "Is Scattered Site: N". At the bottom, there is a table with the following data:</p> <table border="1"><thead><tr><th>Building Name</th><th>Building ID</th><th>Address</th><th>Number of Units</th></tr></thead><tbody><tr><td><a href="#">2001</a></td><td><a href="#">VA9800201</a></td><td>2001 Lafayette Blvd.</td><td>8</td></tr><tr><td><a href="#">2002</a></td><td><a href="#">VA9800012</a></td><td>2001 LAFAYETTE BLVD</td><td>1</td></tr></tbody></table>	Building Name	Building ID	Address	Number of Units	<a href="#">2001</a>	<a href="#">VA9800201</a>	2001 Lafayette Blvd.	8	<a href="#">2002</a>	<a href="#">VA9800012</a>	2001 LAFAYETTE BLVD	1
Building Name	Building ID	Address	Number of Units										
<a href="#">2001</a>	<a href="#">VA9800201</a>	2001 Lafayette Blvd.	8										
<a href="#">2002</a>	<a href="#">VA9800012</a>	2001 LAFAYETTE BLVD	1										

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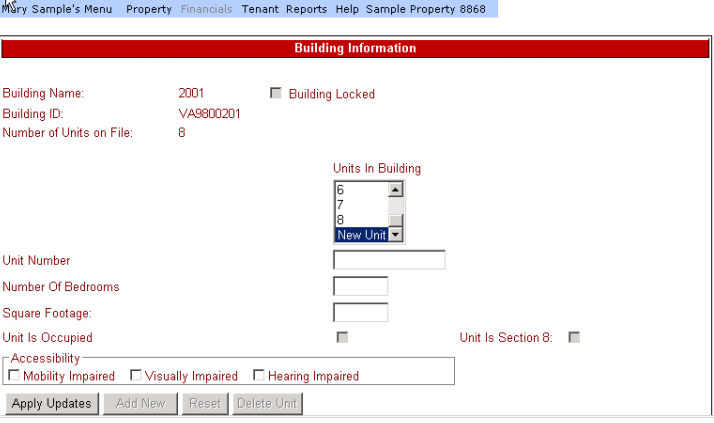
## Viewing Building Information, Continued

Procedure (continued)

Step	Action
3	<p>The <b>Building Information</b> screen displays the building name and total number of units on file at the top of the screen. This information originates in VHDA systems. If you would like to request any changes, contact your VHDA Program Compliance Officer.</p> <p>Once all of your unit details have been verified, the building will be locked (the <b>Building Locked</b> box will be checked) to prevent any accidental changes. If this box is checked and you would like to request any changes, contact your VHDA Program Compliance Officer.</p> <p>The <b>Units in Building</b> area shows a listing of the building's units. Select a unit to view details including the number of bedrooms, square footage, accessibility, whether the unit is occupied and whether it is a Section 8 unit – based upon system information.</p>  <p>The screenshot shows a navigation menu at the top: Mary Sample's Menu, Property, Financials, Tenant, Reports, Help, Sample Property 8868. Below is a red header for 'Building Information'. The main content area displays: Building Name: 2001, Building ID: VA9800201, Number of Units on File: 8, and a 'Building Locked' checkbox. A 'Units In Building' dropdown menu is set to 5. Below are input fields for Unit Number (5), Number Of Bedrooms (2), and Square Footage (500). There are checkboxes for 'Unit Is Occupied' and 'Unit Is Section 8'. An 'Accessibility' section includes checkboxes for 'Mobility Impaired' (checked), 'Visually Impaired', and 'Hearing Impaired'. At the bottom are buttons for 'Apply Updates', 'Add New', 'Reset', and 'Delete Unit'.</p>
4	See the following sections for procedures on working with units.

## Adding a Unit

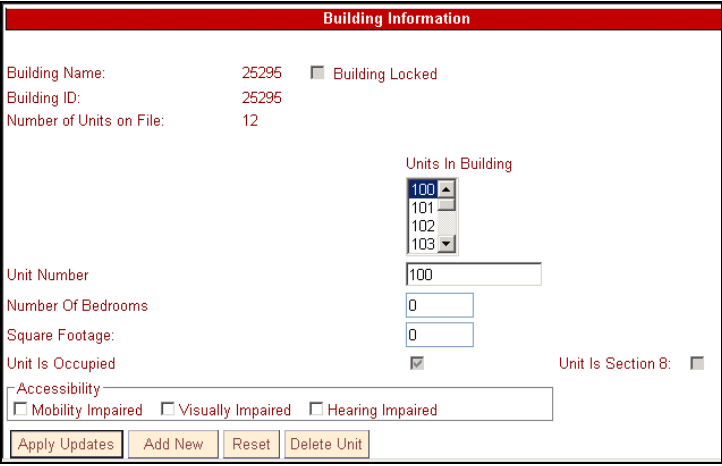
**Procedure** Complete these steps to add a unit. The property or building must not already contain the full number of units as indicated in VHDA systems.

Step	Action
1	Navigate to the <b>Property Information</b> screen. (See “Viewing Property Information” on page 16 for instructions.)
2	Click on the building in the Building Name or Building Number column to which you want to add a unit. The <b>Building Information</b> screen displays. The <b>Units in Building</b> field lists all units already entered into the system. Click <b>Add New</b> .  
3	Enter the <b>Unit Number</b> in the text entry field.
4	Enter the number of bedrooms and square footage in the appropriate fields.
5	The Unit Occupied and Section 8 fields are determined by system data.
6	Check any applicable <b>Accessibility</b> boxes.
7	When you finish entering the unit information, click <b>Apply Updates</b> . The unit will now display in the <b>Tenant Compliance</b> tree.
8	Repeat this process to add more units. You are limited to the total number of units on file for that building.

## Changing Unit Information

**Procedure**

Complete these steps to change the information for a unit. Once all of your unit details have been verified, the building will be locked (the **Building Locked** box will be checked) to prevent accidental changes. If this box is checked and you would like to request any changes, contact your VHDA Program Compliance Officer.

Step	Action
1	Navigate to the <b>Property Information</b> screen. (See “Viewing Property Information” on page 16 for instructions.)
2	<p>Click on the building in the Building Name or Building Number column to which the unit belongs. The <b>Building Information</b> screen displays.</p> 
3	Select the unit you want to modify in the <b>Units in Building</b> list box.
4	Edit the information and then click <b>Apply Updates</b> to save your changes.

## Deleting a Unit

**Procedure** Complete these steps to delete a unit.

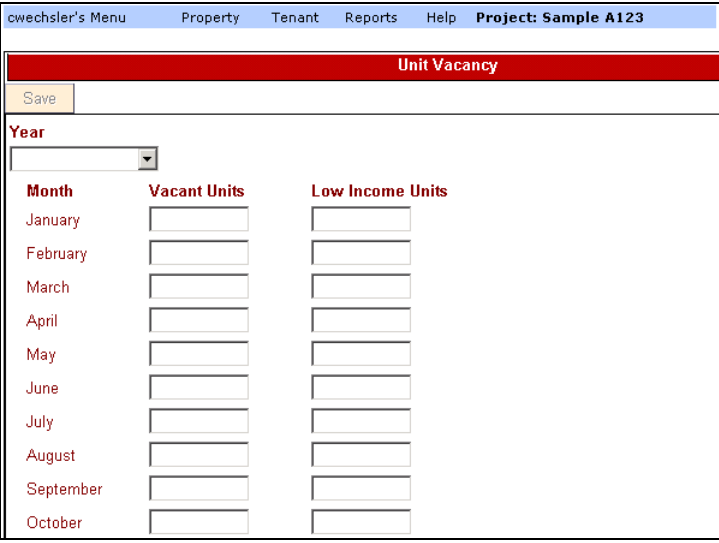
**Important:** You do not have rights to delete a unit that has had any previous tenant history. If you need to delete this type of unit, contact your VHDA Program Compliance Officer for assistance.

Step	Action
1	Navigate to the <b>Property Information</b> screen. (See “Viewing Property Information” on page 16 for instructions.)
2	Click on the building in the Building Name or Building Number column to which the unit belongs. The <b>Building Information</b> screen displays. <div data-bbox="457 680 1177 1140" data-label="Form"> </div>
3	Select the unit you want to modify in the <b>Units in Building</b> list box.
4	Click <b>Delete Unit</b> .
5	The unit is deleted from the system. <p><b>Note:</b> The system will not allow you to delete a unit that has any tenant history. If that occurs you will receive the following error message even if this unit is currently vacant.</p> <p><b>The unit 100 has tenants in it, could not delete unit</b></p>

## Optional Procedure - Recording Unit Vacancies

**Overview** WCMS can allow you to view, record, or change the number of low-income and vacant units reported for a specific month in any of your projects. This feature is good for owners and regional managers to get a quick snap shot of vacancies in a given month.

**Procedure** Complete these steps to enter vacant units.

Step	Action
1	Navigate to the <b>Property Information</b> screen. (See "Viewing Property Information" on page 16 for instructions.)
2	Click on the building name for which you want to view unit vacancies.
3	Click <b>Unit Vacancy</b> on the <b>Property</b> menu. The <b>Unit Vacancy</b> screen appears. 
4	Select the <b>Year</b> from the dropdown menu (new years are added into VHDA systems by your Program Compliance Officer).
5	Enter the number of Vacant and or Low Income Units for the property in the appropriate month.
6	Click <b>Save</b> to save your changes.

## Working with Tenants

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### Overview

This section contains the following topics.

<b>Topic</b>	<b>See Page</b>
Viewing Tenant Information	26
Moving In a Tenant	33
Moving Out a Tenant	42
Certifying a Tenant	44
Modifying a Tenant Certification	47
Modifying the Effective Date	49
Correcting a Tenant Certification	51
Printing a Tenant Certification	53
Transferring a Tenant Between Units	57
Uploading Tenant Data from a File	59
Notifying VHDA About New Tenant Data	61


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## Viewing Tenant Information

**Overview** The complete tenant certification record consists of the following four screens:

- Household Data
- Certification information
- Household Members
- Household Income and Assets

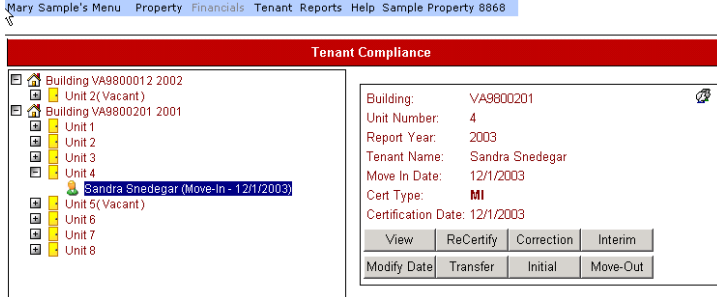

**Viewing Tenant Information** Complete these steps to view tenant information.

Step	Action
1	Navigate to the <b>Assigned Projects</b> screen and select the project from the list. The <b>Project Information</b> screen displays.
2	Click <b>Tenant Compliance</b> under <b>Tenant</b> on the menu bar.
3	<p>The Tenant Compliance screen displays buildings for the selected project in a tree structure. Click the plus sign next to a building to find the unit, and then click the plus sign next to the unit to see the tenant certifications belonging to the unit.</p>  <p>The screenshot shows a web interface with a navigation menu at the top: "Mary Sample's Menu", "Property", "Financials", "Tenant Reports", "Help", and "Sample Property 8868". Below the menu is a red header bar labeled "Tenant Compliance". The main content area displays a tree structure of buildings and units. The first building is "Building VA9800012 2002" with a plus sign next to it. Underneath it is "Unit 2 (Vacant)". The second building is "Building VA9800201 2001" with a plus sign next to it. Underneath it are "Unit 1", "Unit 2", "Unit 3", "Unit 4", and "Unit 5 (Vacant)". Under "Unit 5 (Vacant)" is a person icon and the name "Sandra Snedegar (Move-In - 12/1/2003)". Below that are "Unit 6", "Unit 7", and "Unit 8".</p>

*Continued on next page*

## Viewing Tenant Information, Continued

### Viewing Tenant Information (continued)

Step	Action
4	<p>Click on the tenant certification you want to view. General certification information will display on the right side of the screen as illustrated below.</p>  <p>The screenshot shows a web application interface. At the top, there is a navigation menu with items: Mary Sample's Menu, Property, Financials, Tenant, Reports, Help, and Sample Property 8868. Below this is a red header bar labeled 'Tenant Compliance'. The main area is split into two panes. The left pane is a tree view showing a hierarchy: Building VA9800012 2002 (with a sub-item Unit 2 (Vacant)), Building VA9800201 2001 (with sub-items Unit 1, Unit 2, Unit 3, and Unit 4), and Sandra Snedegar (Move-In - 12/1/2003) (with sub-items Unit 5 (Vacant), Unit 6, Unit 7, and Unit 8). The 'Sandra Snedegar' item is selected. The right pane displays details for the selected tenant: Building: VA9800201, Unit Number: 4, Report Year: 2003, Tenant Name: Sandra Snedegar, Move In Date: 12/1/2003, Cert Type: MI, and Certification Date: 12/1/2003. Below the details are two rows of buttons: View, ReCertify, Correction, Interim; and Modify Date, Transfer, Initial, Move-Out.</p>
5	Click the <b>View</b> button to view details of the tenant certification.
6	<p>The Household Data Entry screen displays basic household data. Use the menu bar at the top of the screen to view additional certification information.</p>  <p>The screenshot shows a horizontal menu bar with four items: Household Data Entry, Certification Information, Household Members, and Household Income &amp; Assets. The 'Household Data Entry' item is highlighted.</p>
7	The following sections describe each of the screens that contain a tenant record.

*Continued on next page*

## Viewing Tenant Information, Continued

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### Viewing Tenant Information (continued)

**Household Data Entry** The **Household Data Entry** screen provides a tenant's basic household data information as follows:

- Report Year (based on the effective date)
- Building BIN
- Unit Number
- Bedroom Size
- Certification Type
- Action Type (this indicates if this is a corrected record)
- Effective Date of the transaction
- Move-In Date
- Head of Household Name
- Contract Rent
- Utility Allowance & Utility Type
- Calculated Number of Family Members (as indicated on the **Household Members** screen)
- Calculated Household Income (as indicated on the **Household Income** screen)

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*Continued on next page*

## Viewing Tenant Information, Continued

**Household Data Entry** (continued) Following is a sample **Household Data Entry** screen.

Household Data Entry		Certification Information		Household Members		Household Income & Assets	
** You Must Save Before Navigating to Another Screen							
<b>Household Data Entry</b>							
Report Year:	2006	Building BIN:	VA9800201	Unit:	3	Bedroom Size:	2
Certification Type:	<b>Recertification</b>	Action Type:	N/A	Effective Date:	8/1/2006	Move-In Date:	8/1/2005
First Name:	Elva	MI:	<input type="checkbox"/>				
Last Name:	Smith						
Contract Rent: \$	1,000	Utility Allowance: \$	45	Utility Type:	Electric		
Calculated # of Family Members:	1	Calculated Household Income:	\$12,792.00				
Edited Date:	4/5/2007 12:33:02 PM	Edited By:	Alena Henderson				
Created Date:	4/5/2007	Created By:	Alena Henderson				
<input type="button" value="Certification Report"/>							

*Continued on next page*

# HDS WEB COMPLIANCE MANAGEMENT SYSTEM USER'S GUIDE

## Certification Information

The **Certification Information** screen provides a tenant's demographic information as follows:

- Basic Household Information
- Owner Income Designation (this is the percentage of the area median income (AMI) the owner has elected and must qualify the household for). For mixed properties, indicate Market if there is no designation applicable.
- Owner Rent Designation (this is the rent percentage an owner has elected to charge a qualified household.)
- Subsidy Type and Amount (if applicable)
- Informational field that indicates if household has any full-time students, and if so, the number of students – as indicated on the Household Member screen
- Household Race and Type (i.e. elderly, disabled)
- Head of Household's Gender
- Social Services – not currently used by VHDA
- Number of dependents under age 18 as indicated on the **Household Member** screen
- Head of Household's Age at Certification (as indicated on the **Household Member** screen)
- Whether the Head of Household is Handicapped or was previously homeless
- Income and Occupation information
- Number of Elderly Occupants as listed on the **Household Member** screen
- Number of Adults with Income as indicated on the **Household Income** screen
- Ignore Program Types at the bottom of the page. VHDA does not utilize that field.

Household Data Entry	Certification Information	Household Members	Household Income & Assets
** You Must Save Before Navigating to Another Screen			
<b>Certification Information</b>			
Report Year:	2006	Building BIN:	VA9800201
Unit:	3	Bedroom Size:	2
Head of Household:	Elva Smith		
Owner Income Designation:	50% AMI	Owner Rent Designation:	50% AMI
Subsidy Type:	N/A	Subsidy: \$	0
Student HH:	<input type="checkbox"/>	Number of Full-Time Students:	0
Household Type:	Family	Household Race:	White
Head Of Household Gender:	Female	Social Services:	-Select-
Number of Dependents Under 18:	0	Homeless Prior?	<input type="checkbox"/>
HH Age At Cert:	46	Handicapped:	<input checked="" type="checkbox"/>
<b>Demographic Information</b>			
Head of Household Primary Sources of Income:	Wages	Head of Household Occupation:	Other
Number of Occupants 62 and Over:	0	Number of Adults with Income:	1
Is this a Single Parent Household?	<input type="checkbox"/>		
<b>Program Type</b>		<b>Tenant Program Type</b>	
Not Applicable			
>			
<			

## Viewing Tenant Information, Continued

### Household Members

The **Household Members** screen captures details of individuals living in a selected unit. The blue fields on this screen show Head of Household information captured previously on the Household Data Entry Screen and Certification Information screen. Any required changes to this information must be made on the originating screen.

In addition to Social Security Number, Name, and Relationship, you should record the following information for each household member:

- Gender
- Birth Date
- Special Status (per legend at the bottom of the screen) – This affects the Full Time Student Status listed on the Income Certification.
- Alien Registration Number (if applicable)
- Race and Ethnicity
- Tenant's Age at Certification (calculated by the system)

### Household Members (continued)

Following is a sample **Household Members** screen.

Household Members						
Report Year:	2005	Building BIN:	VA789			
Unit:	a1	Bedroom Size:	2			
Head of Household:	Sample Data					
Members						
Social Security	Last Name	First Name	Middle Initial	Relationship	Gender	Birth Date
123456789	Data	Sample		H - Head Of Household	Female	01/05/1958
569856231	Data	Spouse		S - Spouse	Male	05/01/1954
<div style="border: 1px solid black; padding: 5px;"> <p>Special Status Legend</p> <p>E Elderly</p> <p>H Handicapped</p> <p>S Full-Time Student</p> <p>D Dependent</p> <p>J Joint Custody Of Dependent</p> </div>						

*Continued on next page*

## Viewing Tenant Information, Continued

### Household Income and Assets

The **Household Income & Assets** screen displays household assets, income, and deductions for tenants in a selected unit as follows:

- Household Assets (the combined assets for the entire household)
- Household Income (income information for each household member)
- Household Deductions (tracks deductions that have been taken for informational purposes)

### Household Income and Assets (continued)

Following is a sample **Household Income and Assets** screen.

Household Income & Assets			
Report Year:	2004	Building BIN:	200
Unit:	E	Bedroom Size:	1
Head of Household:	Sample Family		
Household Assets			
Asset Type	Asset Status	Cash Value	Annual Income
		\$0	\$0
Asset Summary			
Imputed Asset Income	\$0.00		
Asset Income	\$0.00		
Household Income			
Member Name	Income Type	Amount	
		\$0	
Income Summary			
Non-Asset Income	\$0.00		
Annual Income	\$0.00		
Household Deductions (Informational Only)			
Member Name	Deduction Type	Amount	
		\$0	
Save Close			

## Moving In a Tenant

### Overview

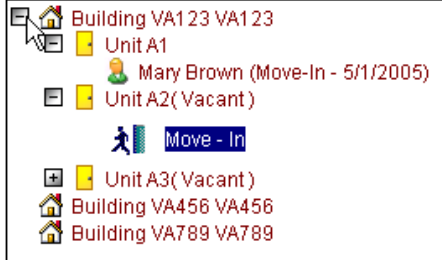
To move in a tenant, enter tenant information using the following screens, which are accessible through the menu bar on the **Tenant Compliance** window:

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

Complete the following steps to move in a tenant.

### Entering Household Data

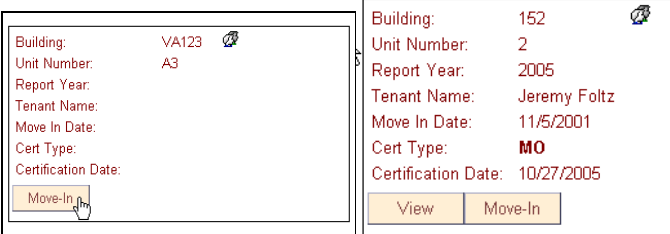

Complete these steps to enter household information.

Step	Action
1	Navigate to the unit. See “Viewing Tenant Information” on page 26 for instructions.
2	<p>Click on the plus sign next to the unit, and then select the tenant record at the top of the list. (This will be Move-In record for a first-time move-in, or the former tenant’s Move-Out record.)</p> 

*Continued on next page*

## Moving In a Tenant, Continued

### Entering Household Data (continued)

Step	Action
3	<p>The area to the right displays the Building and Unit Number. Click the <b>Move-In</b> button.</p>  <p><b>Note:</b> If the <b>Move In</b> button does not appear, you are not viewing a vacant unit; you must first move out the previous tenant. See “Moving Out a Tenant” on page 42 for instructions.</p>
4	<p>The <b>Household Data Entry</b> screen will display. (Refer to “Household Data Entry” on page 28 for more information about this screen.)</p> 

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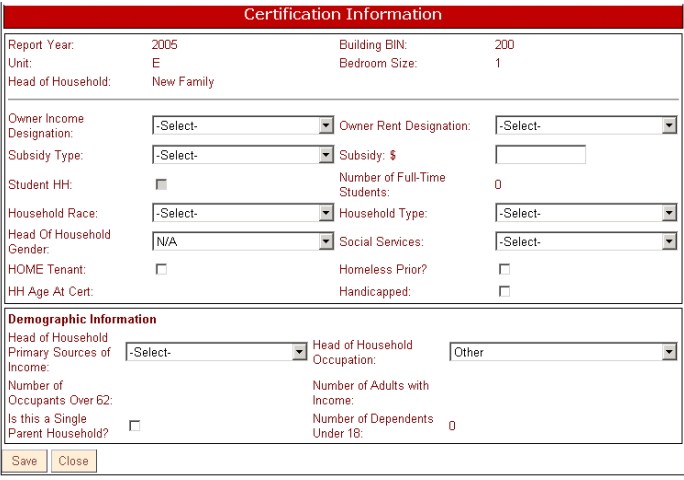
## Moving In a Tenant, Continued

### Entering Household Data (continued)

Step	Action
5	Select an <b>Effective Date</b> from the calendar for this transaction. For a move-in, it should be the same date.
6	You may enter in the move-in date or use the dropdown calendar in the <b>Move In</b> field to select the date the tenant moved in to the unit. For a move-in, it should be the same as effective date.
7	Enter the first, middle initial and last name of the head of household.
8	Enter the monthly rent and amount and type of utility allowance, if applicable.
9	Click <b>Save</b> . The system will automatically fill in the <b>Entered Date</b> and <b>Entered By</b> fields when you save the record.
10	Now add Certification Information. (See below for instructions.)

### Entering Certification Information

Complete these steps to enter Certification Information.

Step	Action
1	Click <b>Certification Information</b> on the menu bar.
2	<p>The <b>Certification Information</b> screen will display. (Refer to "Certification Information" on page 30 for more information about this screen.)</p> 

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## Moving In a Tenant, Continued

### Entering Certification Information (continued)

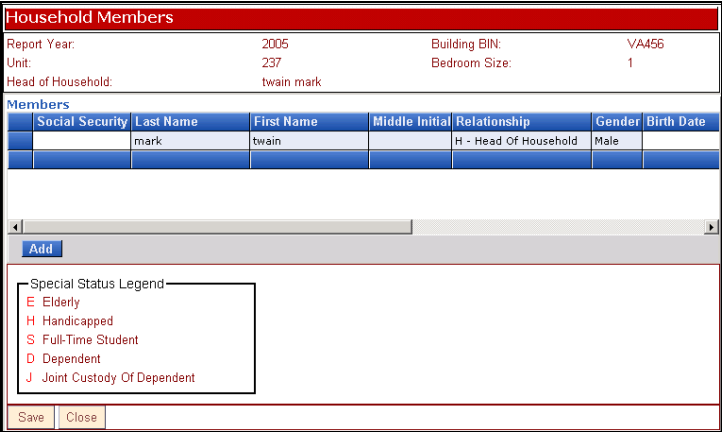
Step	Action
3	Select the <b>Owner Income Designation</b> from the dropdown list. (This is the percentage of Area Median Income the owner must qualify the household for and is important to indicate this is a Tax Credit Low Income unit. For mixed properties, use Market for the market rate units.)
4	Select the <b>Owner Rent Designation</b> from the dropdown list. (This is the rent limit the owner has selected to charge qualified households and is important to indicate this is a Tax Credit Low Income Unit.) If no rent designation applies, indicate Market.
5	If the tenant is receiving any subsidy, select the type from the dropdown list in the <b>Subsidy Type</b> field and enter the amount in the <b>Subsidy Amount</b> field.
6	Select the household type from the dropdown list in the <b>Household Type</b> Field if it is applicable.
7	Select the racial designation of the household from the dropdown list in the <b>Household Race</b> field.
8	Select the Head of Household's <b>Gender</b> from the dropdown list.
9	If the tenant was homeless directly prior to moving into the unit, check the <b>Homeless Prior?</b> checkbox.
10	If any member of the household is designated as handicapped, check the <b>Handicapped</b> checkbox.
11	Now you can add demographic information: <ul style="list-style-type: none"> <li>• Select the Head of Household's primary sources of income.</li> <li>• Select the head of household's occupation from the dropdown list.</li> <li>• If applicable, check the <b>Single Parent Household?</b> checkbox.</li> </ul>
12	Ignore Program Types at the bottom of the page. VHDA does not utilize that field.
13	Click <b>Save</b> .
14	Now add the Household Member information. (See the next section for instructions.)

*Continued on next page*

## Moving In a Tenant, Continued

### Entering Household Member Information

Complete these steps to enter Household Member information.

Step	Action
1	Click <b>Household Members</b> on the menu bar at the top of the screen.
2	<p>The <b>Household Members</b> screen will display. (Refer to "Household Members" on page 31 for more information about this screen.)</p> 
3	The head of household's name appears in the <b>Members</b> area. Click in the <b>Social Security</b> field and type the tenant's Social Security number.
4	<p>Use the <b>Tab</b> key on the keyboard to navigate to the other columns and enter any information you have for this household member.</p> <p><b>Note:</b> The <b>Gender</b>, <b>Race</b>, and <b>Ethnicity</b> columns contain dropdown lists from which to choose. Click in the field to display the down-arrow; click the down-arrow to display the list, and then choose an option.</p> <p>Head of Household information captured previously on the Household Data Entry Screen and Certification Information screen is listed here in the blue fields. Any information with blue shading cannot be changed on this screen; changes must be made on the originating screen.</p>

*Continued on next page*

## Moving In a Tenant, Continued

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### Entering Household Member Information (continued)

Step	Action
5	<p>To add additional household members, click <b>Add</b>. A blank row appears. Enter any information you have for each member (Social Security number and Date of Birth are required fields). Indicate the household member's relationship to the head of household by selecting from the <b>Relationship</b> dropdown list. For <b>Special Status</b>, add the letters separated by commas selected from the legend at the bottom.</p> <p><b>Note:</b> It is important if you have a Full-Time Student to add Status of S.</p> <p><b>Note:</b> If you are also a VHDA Project Based Section 8 property with Tax Credits, there is a field at the end of the grid LIHTC Student Status. Change this to Y to indicate Full Time Student.</p> <p><b>Note:</b> Only one household member may be designated as the Head of Household.</p>
6	To delete a household member, select the row (it will become highlighted in orange) and then press the <b>Delete</b> key on your keyboard. The system will delete the row.
7	Click <b>Save</b> .
8	Now add Household Income and Assets information. (See the next section for instructions.)

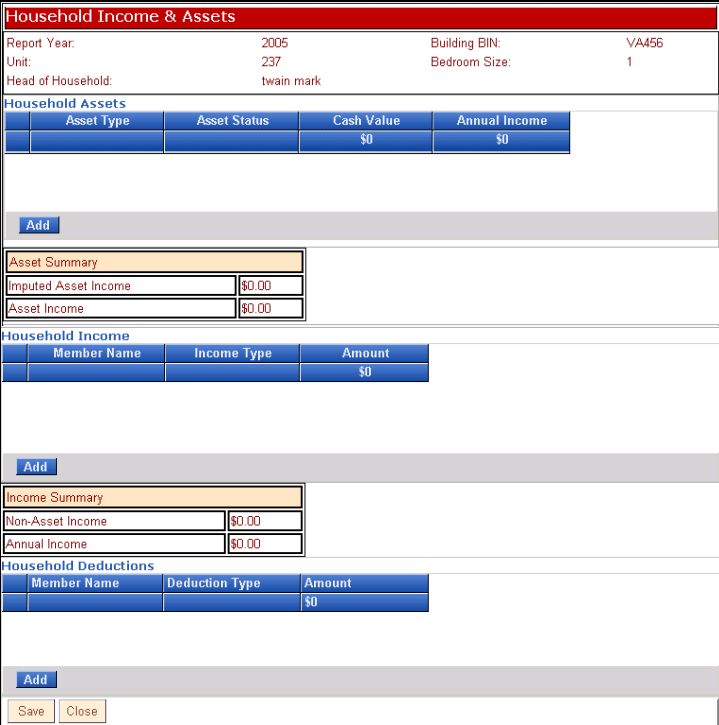
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## Moving In a Tenant, Continued

### Entering Household Income & Assets

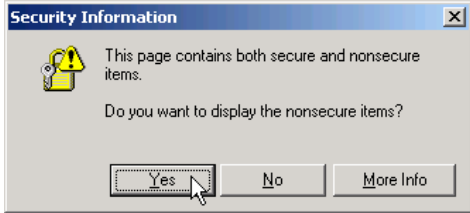
Household assets are any bank accounts and real estate properties owned, or annuities received, by members of the household. Complete these steps to enter Household Income and Assets information.

Step	Action																				
1	Click <b>Household Income &amp; Assets</b> on the menu bar at the top of the screen.																				
2	<p>The <b>Household Income &amp; Assets</b> screen will display. (Refer to "Household Income and Assets" on page 32 for more information about this screen.)</p>  <p>The screenshot displays the following data:</p> <ul style="list-style-type: none"> <li><b>Report Year:</b> 2005</li> <li><b>Unit:</b> 237</li> <li><b>Head of Household:</b> twain mark</li> <li><b>Building BIN:</b> VA456</li> <li><b>Bedroom Size:</b> 1</li> </ul> <p><b>Household Assets Table:</b></p> <table border="1"> <thead> <tr> <th>Asset Type</th> <th>Asset Status</th> <th>Cash Value</th> <th>Annual Income</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>\$0</td> <td>\$0</td> </tr> </tbody> </table> <p><b>Household Income Table:</b></p> <table border="1"> <thead> <tr> <th>Member Name</th> <th>Income Type</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>\$0</td> </tr> </tbody> </table> <p><b>Household Deductions Table:</b></p> <table border="1"> <thead> <tr> <th>Member Name</th> <th>Deduction Type</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>\$0</td> </tr> </tbody> </table>	Asset Type	Asset Status	Cash Value	Annual Income			\$0	\$0	Member Name	Income Type	Amount			\$0	Member Name	Deduction Type	Amount			\$0
Asset Type	Asset Status	Cash Value	Annual Income																		
		\$0	\$0																		
Member Name	Income Type	Amount																			
		\$0																			
Member Name	Deduction Type	Amount																			
		\$0																			
3	Click <b>Add</b> in the <b>Household Assets</b> area to enter any assets. A new blank row appears.																				
4	Select the <b>Asset Type</b> and <b>Asset Status</b> from the dropdown lists. The status will either be "Average", "Current", or "Imputed" (meaning that it was disposed of within the last two years).																				

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## Moving In a Tenant, Continued






### Entering Household Income & Assets (continued)

Step	Action
5	Enter the <b>Cash Value</b> and <b>Annual Income</b> . <b>Note: DO NOT INCLUDE ANY DECIMALS in your entry (i.e. 10.00 or 2.54). Round up to the nearest dollar.</b>
6	Click <b>Add</b> for each asset you enter.
7	Now add the household income information for each member. Click <b>Add</b> . A new blank row appears.
8	Click in the <b>Member Name</b> field and select a household member from the dropdown list.
9	Select the member's <b>Income Type</b> from the dropdown list.
10	Enter the amount of annual income this household member receives or expects from this income type. <b>Note: DO NOT INCLUDE ANY DECIMALS in your entry (i.e. 10.00 or 2.54)</b>
11	Enter any deductions for any household members in the <b>Household Deductions</b> area. Select the household member's name and the deduction type from the dropdown list, and then enter the amount of the deduction.  <b>Note:</b> Household Deductions are informational only to assist to determine a household's eligibility for participation in VHDA's conventional loan programs. Utilize Worksheet A or B located on VHDA.com to make the determination if a deduction is necessary.
12	To delete an item from Household Assets, Income, or Deductions, select the row (it will become highlighted in orange) and then press the <b>Delete</b> key on your keyboard. The system will delete the row and may display a security message. Click <b>Yes</b> to close the message.  

*Continued on next page*

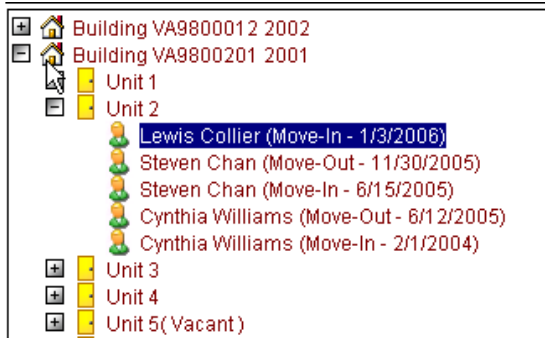
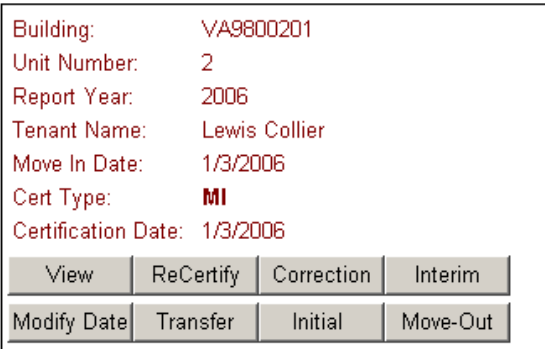
## Moving In a Tenant, Continued

### Entering Household Income & Assets (continued)

Step	Action						
13	<p>Click <b>Save</b>. The system calculates the total for each category and displays a summary in each grid.</p> <div data-bbox="553 464 1084 590" style="border: 1px solid black; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f4b084;"> <th colspan="2" style="text-align: left;">Income Summary</th> </tr> </thead> <tbody> <tr> <td style="width: 70%;">Non-Asset Income</td> <td style="text-align: right;">\$15,000.00</td> </tr> <tr> <td>Annual Income</td> <td style="text-align: right;">\$15,000.00</td> </tr> </tbody> </table> </div>	Income Summary		Non-Asset Income	\$15,000.00	Annual Income	\$15,000.00
Income Summary							
Non-Asset Income	\$15,000.00						
Annual Income	\$15,000.00						
14	<p>Click <b>Close</b> to close the tenant record and refresh our data. The Move-In Certification will now display in the <b>Tenant Compliance</b> tree.</p> <div data-bbox="602 716 1036 894" style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> <li> Building VA123</li> <li> Building VA456</li> <li> Unit 237 <ul style="list-style-type: none"> <li> Twain Mark (Move-In - 6/27/2005)</li> </ul> </li> <li> Building VA789</li> </ul> </div>						
15	<p>WCMS is a direct link to VHDA's Database. Entering information here automatically updates our system.</p>						

**Moving Out a Tenant**

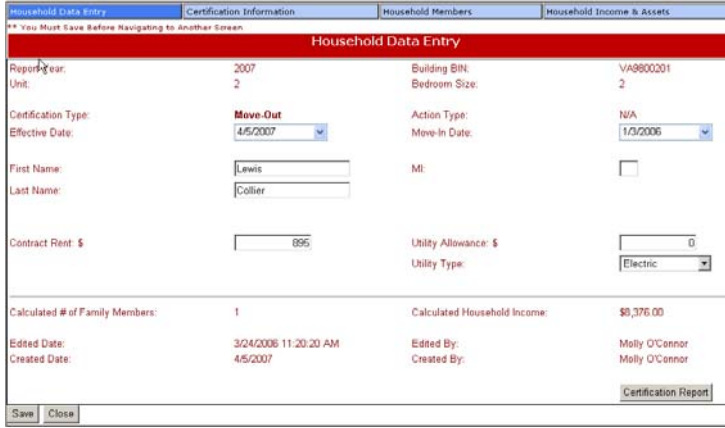
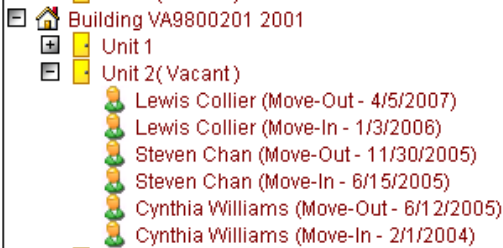
**Procedure** Complete these steps to move out a tenant.

Step	Action
1	Navigate to the unit. See "Viewing Tenant Information" on page 26 for instructions.
2	<p>Click the plus sign next to the unit, and then select the tenant record at the top of the list.</p> 
3	<p>The area to the right displays a summary of the Certification information. Ensure you are on the correct tenant record. Click the <b>Move-Out</b> button.</p> 

*Continued on next page*

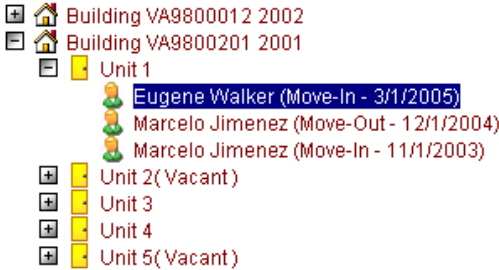
## Moving Out a Tenant, Continued

Procedure (continued)

Step	Action
4	<p>The <b>Household Data Entry</b> screen displays. It displays all of the information contained in the record you selected, but the <b>Certification Type</b> is now listed as "Move-Out".</p> 
5	Ensure that this is the correct Household. Enter the move-out date in the <b>Effective Date</b> field and make any other necessary changes.
6	Click <b>Save</b> .
7	When you finish entering and saving all changes, click <b>Close</b> .
8	<p>The Move-Out Certification will now display in the <b>Tenant Compliance</b> tree and the unit will indicate (Vacant).</p> 

## Certifying a Tenant

**Procedure** Complete these steps to certify a tenant.

Step	Action
1	Navigate to the unit. See "Viewing Tenant Information" on page 26 for instructions.
2	Click on the plus sign next to the unit, and then select the tenant record at the top of the list. This is the most recent tenant record.  <ul style="list-style-type: none"><li>+ Building VA9800012 2002</li><li>- Building VA9800201 2001<ul style="list-style-type: none"><li>- Unit 1<ul style="list-style-type: none"><li>Eugene Walker (Move-In - 3/1/2005)</li><li>Marcelo Jimenez (Move-Out - 12/1/2004)</li><li>Marcelo Jimenez (Move-In - 11/1/2003)</li></ul></li><li>+ Unit 2(Vacant)</li><li>+ Unit 3</li><li>+ Unit 4</li><li>+ Unit 5(Vacant)</li></ul></li></ul>

*Continued on next page*

## Certifying a Tenant, Continued

### Procedure (continued)

Step	Action								
3	<p>The area to the right displays a summary of the Certification information. Click the appropriate button to select the certification type: <b>Initial</b>, <b>Interim</b>, or <b>ReCertify</b>.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Building: VA9800201            Unit Number: 1            Report Year: 2005            Tenant Name: Eugene Walker            Move In Date: 3/1/2005            Cert Type: <b>MI</b>            Certification Date: 3/1/2005</p> <table border="1" style="width: 100%; text-align: center;"> <tr> <td>View</td> <td>ReCertify</td> <td>Correction</td> <td>Interim</td> </tr> <tr> <td>Modify Date</td> <td>Transfer</td> <td>Initial</td> <td>Move-Out</td> </tr> </table> </div> <ul style="list-style-type: none"> <li>• <b>Initial</b> creates an initial certification that will replace the move-in income information for all compliance testing.</li> <li>• <b>Interim</b> is used to track events outside of the recertification process such as changes in household.</li> <li>• <b>Recertify</b> is used to process annual or 3 year certifications on the household. You will be able to update the household at that time.</li> </ul> <p><b>Note:</b> Tax Exempt properties should use Initials for any changes in household composition to re-qualify the household. Tax Credit properties with existing residents should use Initials to initially qualify the household for tax credit purposes.</p>	View	ReCertify	Correction	Interim	Modify Date	Transfer	Initial	Move-Out
View	ReCertify	Correction	Interim						
Modify Date	Transfer	Initial	Move-Out						
4	<p>The <b>Household Data Entry</b> screen will appear. It displays all of the information contained in the record you selected, but the <b>Certification Type</b> is now listed as the type you selected.</p>								

*Continued on next page*

## Certifying a Tenant, Continued

**Procedure** (continued)

Step	Action
5	Change the effective date to the new effective date of your certification. Make any other necessary changes to the household data information and then click <b>Save</b> . (Refer to “Entering Household Data” on page 33 for detailed instructions on entering information on this screen.)
6	Use the menu bar at the top of the screen to navigate to the <b>Certification Information, Household Members, and Household Income &amp; Assets</b> screens and make any necessary changes. (Refer to “Entering Certification Information, “Entering Household Member Information”, and “Entering Household Income & Assets” beginning on page 35 for detailed instructions about entering information on these screens.)  <b>Note:</b> Click <b>Save</b> before leaving each screen.  Tax Exempt Properties should process an initial with any changes to the household composition.
	<b>Note:</b> If you need to change the Head of Household, open the <b>Household Data</b> screen and edit the <b>Name</b> fields to add the new head of household. Once you save and close this screen, the Head of Household name will be replaced by the new name. If the new Head of Household had been listed as a household member and is not a new member, open the <b>Household Members</b> screen and delete the member row. Then, edit the values related to the new Head of Household on the <b>Certification Information</b> screen.
7	When you finish entering and saving all changes, click <b>Close</b> .
8	The new certification will display in the <b>Tenant Compliance</b> tree.

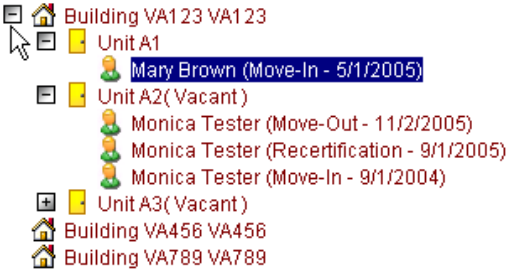
## Modifying a Tenant Certification

### Overview

You may modify a Tenant Certification when you need to change information on the same day as the original entry. After the first day, if you need to make changes to the information, you will need to make a Correction to the certification (The procedure is on page 51.) If you wish to modify the effective date, you can use the Modify Date feature only on the most current certification. If you need to modify an effective date in an earlier certification, you should contact your VHDA Program Compliance Officer to make that change for you.

### Procedure


Complete these steps to modify a tenant certification.

Step	Action
1	Navigate to the unit. See “Viewing Tenant Information” on page 26 for instructions.
2	<p>Click the plus sign next to the unit, and then select the tenant record at the top of the list. This is the most recent tenant record.</p>  <p>The screenshot shows a hierarchical list of buildings and units. The top-level items are 'Building VA123 VA123', 'Building VA456 VA456', and 'Building VA789 VA789'. Under 'Building VA123 VA123', there are three units: 'Unit A1', 'Unit A2 (Vacant)', and 'Unit A3 (Vacant)'. Under 'Unit A1', there are three tenant records: 'Mary Brown (Move-In - 5/1/2005)', 'Monica Tester (Move-Out - 11/2/2005)', and 'Monica Tester (Move-In - 9/1/2004)'. The 'Mary Brown' record is highlighted in blue, and a mouse cursor is pointing at a plus sign next to 'Unit A1'.</p>

*Continued on next page*

## Modifying a Tenant Certification, Continued

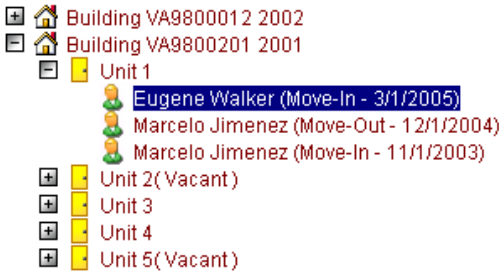
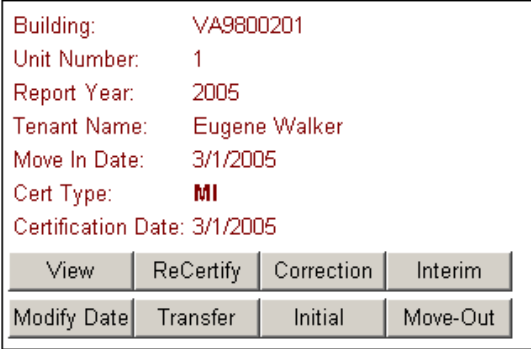
Procedure (continued)

Step	Action								
3	<p>The area to the right displays a summary of the Certification information. Click the <b>Modify</b> button.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Building: VA123 </p> <p>Unit Number: A1</p> <p>Report Year: 2005</p> <p>Tenant Name: Mary Brown</p> <p>Move In Date: 5/1/2005</p> <p>Cert Type: <b>MI</b></p> <p>Certification Date: 5/1/2005</p> <table border="1" style="width: 100%; text-align: center; margin-top: 5px;"> <tr> <td>View</td> <td>ReCertify</td> <td>Correction</td> <td>Interim</td> </tr> <tr> <td>Modify</td> <td>Transfer</td> <td>Initial</td> <td>Move-Out</td> </tr> </table> </div>	View	ReCertify	Correction	Interim	Modify	Transfer	Initial	Move-Out
View	ReCertify	Correction	Interim						
Modify	Transfer	Initial	Move-Out						
4	<p>The <b>Household Data Entry</b> screen will appear. It displays all of the information contained in the record you selected.</p>								
5	<p>Make any necessary changes to the household data information and then click <b>Save</b>. (Refer to “Entering Household Data” on page 33 for detailed instructions on entering information on this screen.)</p>								
6	<p>Use the menu bar at the top of the screen to navigate to <b>Certification Information, Household Members, and Household Income &amp; Assets</b> screens and make any necessary changes. (Refer to “Entering Certification Information, “Entering Household Member Information”, and “Entering Household Income &amp; Assets” beginning on page 35 for detailed instructions about entering information on these screens.)</p> <p><b>Note:</b> Please be sure to click <b>Save</b> only on the screen that you modified the data.</p>								
7	<p>When you finish entering and saving all changes, click <b>Close</b>. Your previous record will now contain the updated information without creating a new certification.</p>								

## Modifying the Effective Date

**Overview** If you wish to modify the effective date on a certification that was entered at an earlier time, you can use the Modify Date feature. If you wish to update any other information, a correction must be used.

**Procedure** Complete these steps to modify an effective date.

Step	Action
1	Navigate to the unit. See "Viewing Tenant Information" on page 26 for instructions.
2	<p>Click the plus sign next to the unit, and then select the tenant record at the top of the list. This is the most recent tenant record.</p>  <p>The screenshot shows a tree view of buildings and units. Under 'Building VA9800201 2001', 'Unit 1' is expanded. The tenant list for Unit 1 includes: Eugene Walker (Move-In - 3/1/2005), Marcelo Jimenez (Move-Out - 12/1/2004), and Marcelo Jimenez (Move-In - 11/1/2003). Other units listed are Unit 2 (Vacant), Unit 3, Unit 4, and Unit 5 (Vacant).</p>
3	<p>The area to the right displays a summary of the Certification information. Click the <b>Modify Date</b> button.</p>  <p>The screenshot shows a summary of certification information for Building VA9800201, Unit Number 1, Report Year 2005, Tenant Name Eugene Walker, Move In Date 3/1/2005, Cert Type MI, and Certification Date 3/1/2005. Below the summary are two rows of buttons: View, ReCertify, Correction, Interim; and Modify Date, Transfer, Initial, Move-Out.</p>
4	The <b>Household Data Entry</b> screen will appear. It displays all of the information contained in the record you selected.

*Continued on next page*

## Modifying the Effective Date, Continued

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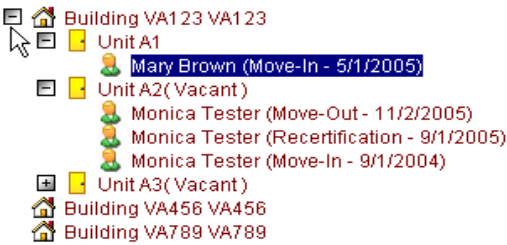
### Procedure (continued)

Step	Action
5	Change the effective date and then click <b>Save</b> . If you modify a move-in record, the move-in date will also change once you hit <b>Save</b> .
6	When you finish updating the dates, click <b>Close</b> . Our original record will now display the new date without creating a new certification.

## Correcting a Tenant Certification

**Overview** If you discover there was an error in the original certification after the first day of entry (other than effective date), you would process a Correction to a Tenant Certification.

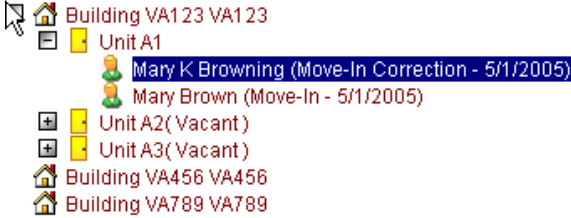
**Procedure** Complete these steps to correct a Tenant Certification.

Step	Action
1	Navigate to the unit. See "Viewing Tenant Information" on page 26 for instructions.
2	<p>Click the plus sign next to the unit, and then select the tenant record you wish to correct. It does not have to be the most current record.</p> 
3	The area to the right displays a summary of the Certification information. Click the <b>Correction</b> button.
4	The <b>Household Data Entry</b> screen will appear. It displays all of the information contained in the record you selected.
5	<p>Make any necessary changes to the household data information and then click <b>Save</b>. (Refer to "Entering Household Data" on page 33 for detailed instructions on entering information on this screen.)</p> <p><b>Note:</b> You must be sure to save on this screen as it establishes the corrected certification in the household. Please note to select <b>Save</b> only on those screens with changes.</p>
6	Use the menu bar at the top of the screen to navigate to <b>Certification Information</b> , <b>Household Members</b> , and <b>Household Income &amp; Assets</b> screens and make any necessary changes. (Refer to "Entering Certification Information", "Entering Household Member Information", and "Entering Household Income & Assets" beginning on page 35 for detailed instructions about entering information on these screens.)

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## Correcting a Tenant Certification, Continued

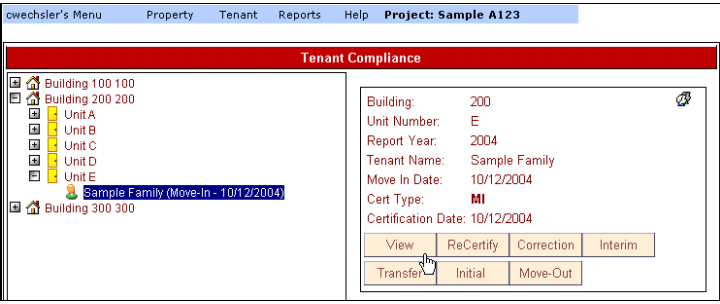
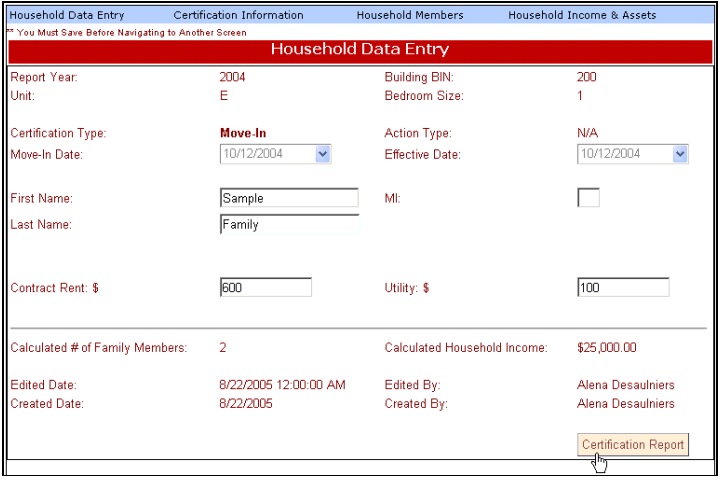
Procedure (continued)

Step	Action
7	<p>When you finish entering and saving all changes, click <b>Close</b>.</p> <p><b>NOTE:</b> In order to see your correction, refresh WCMS by selecting project again.</p>
8	<p>The corrected certification will display in the Tenant Compliance tree above the original certification. This information will be used in place of the original for all compliance testing at VHDA.</p>  <p>The screenshot shows a tree structure with the following items:</p> <ul style="list-style-type: none"> <li>Building VA123 VA123             <ul style="list-style-type: none"> <li>Unit A1                 <ul style="list-style-type: none"> <li>Mary K Browning (Move-In Correction - 5/1/2005) [highlighted in blue]</li> <li>Mary Brown (Move-In - 5/1/2005)</li> </ul> </li> <li>Unit A2 (Vacant)</li> <li>Unit A3 (Vacant)</li> </ul> </li> <li>Building VA456 VA456</li> <li>Building VA789 VA789</li> </ul> <p>If you do not see your correction right away, do not re-enter information, or select correction again. Go to the "blue menu" item and click on <b>Tenant</b> and <b>Tenant Compliance</b>, then the applicable <b>Building</b> and <b>Unit</b>. You should now see the corrected certification.</p>

## Printing a Tenant Certification

**Overview** Tenant certification information is available on the WCMS screens or can be viewed in report format and printed.

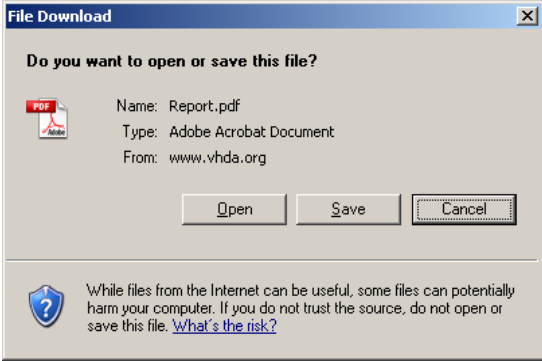
**Procedure** Complete these steps to view or print a tenant certification.

Step	Action
1	Navigate to the unit. See "Viewing Tenant Information" on page 26 for instructions.
2	Click the plus sign next to the unit, and then select the tenant record and then click <b>View</b> to view the certification. You can also request this report after entering data and saving any certification.
	
3	Click <b>Certification Report</b> on the <b>Household Data Entry</b> screen.
	

*Continued on next page*

## Printing a Tenant Certification, Continued

Procedure (continued)

Step	Action
4	<p>The system will display a file download message asking if you want to open or save the file. Select <b>Open</b>.</p> 

*Continued on next page*

## Printing a Tenant Certification, Continued

Procedure (continued)

Step	Action																																																																										
5	<p>Adobe Acrobat will open and the certification displays as illustrated below. This is a two- page form. Use the Acrobat print function to print the certification. (See “Working with Reports” on page 63 for more information.)</p> <p><b>Page 1</b></p> <div style="border: 1px solid black; padding: 5px;"> <p><b>TENANT INCOME CERTIFICATION</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"><b>Certification Type:</b> Move-In</td> <td style="width: 40%;"><b>Certification Date:</b> 02/15/2006</td> </tr> <tr> <td></td> <td><b>Move-In Date:</b> 02/15/2006</td> </tr> </table> <p style="text-align: center;"><b>PART I - DEVELOPMENT DATA</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Property Name: Sample Property</td> <td style="width: 50%;">Building: 2001</td> </tr> <tr> <td>Address: 2001 LAFAYETTE BLVD Fredericksburg, VA 224012267</td> <td>BIN #: VA9600201</td> </tr> <tr> <td>County: Fredericksburg City</td> <td>Unit Number: 1 # Bedrooms: 2</td> </tr> </table> <p style="text-align: center;"><b>PART II - HOUSEHOLD COMPOSITION</b></p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Last Name</th> <th style="text-align: left;">First Name</th> <th style="text-align: left;">Relationship</th> <th style="text-align: left;">Age</th> <th style="text-align: left;">Gender</th> <th style="text-align: left;">Race</th> <th style="text-align: left;">P/T Student</th> <th style="text-align: left;">SSN/Alten Rec. No.</th> </tr> </thead> <tbody> <tr> <td>Walker</td> <td>Eugene</td> <td>H - Head Of Household</td> <td>47</td> <td>M</td> <td></td> <td>N</td> <td>228-78-6527</td> </tr> <tr> <td>Dwyer</td> <td>John</td> <td>K - Co-Head</td> <td>47</td> <td>M</td> <td></td> <td>N</td> <td>000-00-0000</td> </tr> </tbody> </table> <p style="text-align: center;"><b>PART III - GROSS ANNUAL INCOME (USE ANNUAL AMOUNTS)</b></p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Full Name</th> <th style="text-align: left;">Income Source</th> <th style="text-align: right;">Amount</th> </tr> </thead> <tbody> <tr> <td>Eugene Walker</td> <td>Social Security</td> <td style="text-align: right;">\$617</td> </tr> <tr> <td>John Dwyer</td> <td>Social Security</td> <td style="text-align: right;">\$752</td> </tr> <tr> <td colspan="2" style="text-align: right;"><b>Total Income:</b></td> <td style="text-align: right;"><b>\$1,369</b></td> </tr> </tbody> </table> <p style="text-align: center;"><b>PART IV - INCOME FROM ASSETS</b></p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Type of Asset</th> <th style="text-align: left;">Cat</th> <th style="text-align: left;">Cash Value of Asset</th> <th style="text-align: left;">Annual Income from Asset</th> </tr> </thead> <tbody> <tr> <td colspan="4" style="text-align: center;"><b>TOTALS</b></td> </tr> <tr> <td>Cash Value Total (if over \$5,000)</td> <td>\$0 X</td> <td>Passbook Rate</td> <td>= Imputed Income \$0</td> </tr> <tr> <td colspan="3">Enter the greater of the Annual Income from Asset Total or the Imputed Income Total:</td> <td style="text-align: right;"><b>TOTAL INCOME FROM ASSETS \$0</b></td> </tr> <tr> <td colspan="3" style="text-align: right;"><b>Total Annual Household Income from all Sources (Part III Total Income + Part IV Total Income From Assets)</b></td> <td style="text-align: right;"><b>\$1,369</b></td> </tr> </tbody> </table> <p style="text-align: center;"><b>HOUSEHOLD CERTIFICATION &amp; SIGNATURES</b></p> <p>The information on this form will be used to determine maximum income eligibility. I/we have provided for each person(s) set forth in Part II acceptable verification of current anticipated annual income. I/we agree to notify the landlord immediately upon any member of the household moving out of the unit or any new member moving in. I/we agree to notify the landlord immediately upon any member becoming a full-time student.</p> <p>Upon penalties of perjury, I/we certify that the information presented in this Certification is true and accurate to the best of my/our knowledge and belief. The undersigned further understands that providing false representations herein constitutes an act of fraud. False, misleading or incomplete information may result in the termination of the lease agreement.</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Signature _____</td> <td style="width: 10%;">(Date) _____</td> <td style="width: 50%;">Signature _____</td> <td style="width: 10%;">(Date) _____</td> </tr> <tr> <td>Signature _____</td> <td>(Date) _____</td> <td>Signature _____</td> <td>(Date) _____</td> </tr> </table> </div>	<b>Certification Type:</b> Move-In	<b>Certification Date:</b> 02/15/2006		<b>Move-In Date:</b> 02/15/2006	Property Name: Sample Property	Building: 2001	Address: 2001 LAFAYETTE BLVD Fredericksburg, VA 224012267	BIN #: VA9600201	County: Fredericksburg City	Unit Number: 1 # Bedrooms: 2	Last Name	First Name	Relationship	Age	Gender	Race	P/T Student	SSN/Alten Rec. No.	Walker	Eugene	H - Head Of Household	47	M		N	228-78-6527	Dwyer	John	K - Co-Head	47	M		N	000-00-0000	Full Name	Income Source	Amount	Eugene Walker	Social Security	\$617	John Dwyer	Social Security	\$752	<b>Total Income:</b>		<b>\$1,369</b>	Type of Asset	Cat	Cash Value of Asset	Annual Income from Asset	<b>TOTALS</b>				Cash Value Total (if over \$5,000)	\$0 X	Passbook Rate	= Imputed Income \$0	Enter the greater of the Annual Income from Asset Total or the Imputed Income Total:			<b>TOTAL INCOME FROM ASSETS \$0</b>	<b>Total Annual Household Income from all Sources (Part III Total Income + Part IV Total Income From Assets)</b>			<b>\$1,369</b>	Signature _____	(Date) _____	Signature _____	(Date) _____	Signature _____	(Date) _____	Signature _____	(Date) _____
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# HDS WEB COMPLIANCE MANAGEMENT SYSTEM USER'S GUIDE


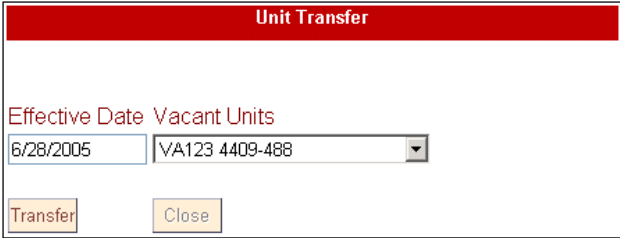
## Printing a Tenant Certification, Continued

Procedure (continued)

Step	Action																														
	<p><b>Page 2</b></p> <table border="1"> <thead> <tr> <th colspan="2">PART V - DETERMINATION OF INCOME ELIGIBILITY</th> </tr> </thead> <tbody> <tr> <td>Total Annual Income From all Sources: <input type="text" value="\$1,369"/></td> <td>Recertification Only Current Income Limit x 140% <input type="text" value="\$0"/> N/A</td> </tr> <tr> <td>Current Owner Income Designation: 50% AMI</td> <td>Current Non AFS Income Limit: \$44,850</td> </tr> <tr> <td>Current Income Limit per Family Size: \$35,700</td> <td>Household Meets Current Non-AFS Income Restriction</td> </tr> <tr> <td>Household Meets Current Income Restriction</td> <td>Household Size at Move-In: 2</td> </tr> <tr> <td>Household Income at Move-In: \$1,369</td> <td>Move In Non AFS Income Limit: \$44,850</td> </tr> <tr> <td>Move In Income Limit per Family Size: \$35,700</td> <td>Household Meets Move In Non-AFS Income Restriction</td> </tr> <tr> <td>Household Meets Move In Income Restriction</td> <td></td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="2">PART VI - RENT</th> </tr> </thead> <tbody> <tr> <td>Tenant Paid Rent: \$0</td> <td>Rent Assistance:</td> </tr> <tr> <td>Utility Allowance: \$0</td> <td>Owner Rent Designation: Not Specified</td> </tr> <tr> <td>GROSS RENT FOR UNIT: (Tenant Paid Rent plus Utility Allowance) <input type="text" value="\$0"/></td> <td>Owner Rent Limit: \$0</td> </tr> <tr> <td></td> <td>Unit Meets Rent Restriction: N/A</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="2">PART VII - STUDENT STATUS</th> </tr> </thead> <tbody> <tr> <td>ARE ALL OCCUPANTS FULL TIME STUDENTS?</td> <td>NO</td> </tr> </tbody> </table> <p><b>SIGNATURE OF OWNER/REPRESENTATIVE</b></p> <p>Based on the representations herein and upon the proofs and documentation required to be submitted, the individual(s) named in Part II of this Tenant Income Certification is/are eligible under the provisions of Section 42 of the Internal Revenue Code, as amended, and the Land Use Restriction Agreement (if applicable), to live in a unit in this Project.</p> <p>SIGNATURE OF OWNER/REPRESENTATIVE _____ DATE _____</p>	PART V - DETERMINATION OF INCOME ELIGIBILITY		Total Annual Income From all Sources: <input type="text" value="\$1,369"/>	Recertification Only Current Income Limit x 140% <input type="text" value="\$0"/> N/A	Current Owner Income Designation: 50% AMI	Current Non AFS Income Limit: \$44,850	Current Income Limit per Family Size: \$35,700	Household Meets Current Non-AFS Income Restriction	Household Meets Current Income Restriction	Household Size at Move-In: 2	Household Income at Move-In: \$1,369	Move In Non AFS Income Limit: \$44,850	Move In Income Limit per Family Size: \$35,700	Household Meets Move In Non-AFS Income Restriction	Household Meets Move In Income Restriction		PART VI - RENT		Tenant Paid Rent: \$0	Rent Assistance:	Utility Allowance: \$0	Owner Rent Designation: Not Specified	GROSS RENT FOR UNIT: (Tenant Paid Rent plus Utility Allowance) <input type="text" value="\$0"/>	Owner Rent Limit: \$0		Unit Meets Rent Restriction: N/A	PART VII - STUDENT STATUS		ARE ALL OCCUPANTS FULL TIME STUDENTS?	NO
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6	If you choose the <b>Save</b> option, the system will prompt you for a location in which to save the report. Enter the required information; you can view or print the report at any time.																														

## Transferring a Tenant Between Units

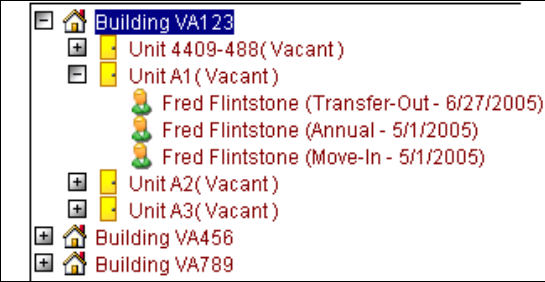

**Procedure** Complete these steps to transfer a tenant from one unit to another.

Step	Action
1	Navigate to the unit. See "Viewing Tenant Information" on page 26 for instructions.
2	Click the plus sign next to the unit, and then select the tenant record at the top of the list. This is the most recent tenant record.  
3	The area to the right displays a summary of the Certification information. Click the <b>Transfer</b> button.
4	The <b>Unit Transfer</b> screen displays. If necessary, change the <b>Effective Date</b> .  
5	The system will provide a list of vacant units within the property. Select the unit to which the tenant is moving from the <b>Vacant Units</b> dropdown list.
6	Click <b>Transfer</b> and then click <b>Close</b> to save your changes.

*Continued on next page*

**Transferring a Tenant Between Units, Continued**


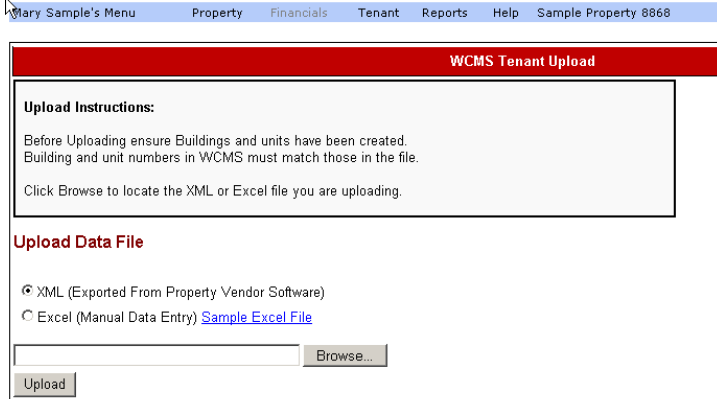
Procedure (continued)

Step	Action
7	<p>The certification will display under the now vacant unit in the <b>Tenant Compliance</b> tree as a “Transfer-Out” certification.</p>  <p>The screenshot shows a tree view with the following structure:</p> <ul style="list-style-type: none"> <li>Building VA123             <ul style="list-style-type: none"> <li>Unit 4409-488 (Vacant)                     <ul style="list-style-type: none"> <li>Unit A1 (Vacant)                             <ul style="list-style-type: none"> <li>Fred Flintstone (Transfer-Out - 6/27/2005)</li> <li>Fred Flintstone (Annual - 5/1/2005)</li> <li>Fred Flintstone (Move-In - 5/1/2005)</li> </ul> </li> <li>Unit A2 (Vacant)</li> <li>Unit A3 (Vacant)</li> </ul> </li> <li>Building VA456</li> <li>Building VA789</li> </ul> </li> </ul>
8	<p>The tenant certification “Transfer-In” will appear under the new unit.</p>  <p>The screenshot shows a tree view with the following structure:</p> <ul style="list-style-type: none"> <li>Building VA123             <ul style="list-style-type: none"> <li>Unit 4409-488 (Vacant)                     <ul style="list-style-type: none"> <li>Unit A1 (Vacant)</li> <li>Unit A2 (Vacant)</li> <li>Unit A3                             <ul style="list-style-type: none"> <li>Fred Flintstone (Transfer-In - 6/27/2005)</li> </ul> </li> </ul> </li> <li>Building VA456</li> <li>Building VA789</li> </ul> </li> </ul>

## Uploading Tenant Data from a File

**Overview** WCMS is able to accept XML files to upload tenant information directly from your management software such as OneSite, Yardi or Boston Post. You must contact your vendor for details on creating these files.

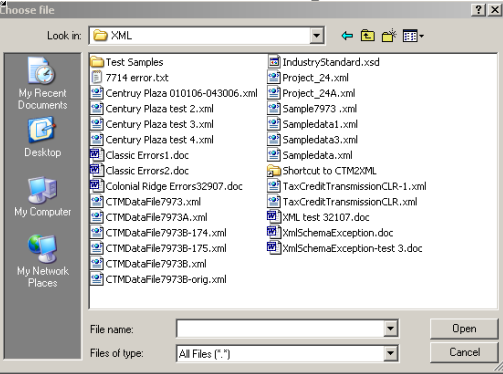
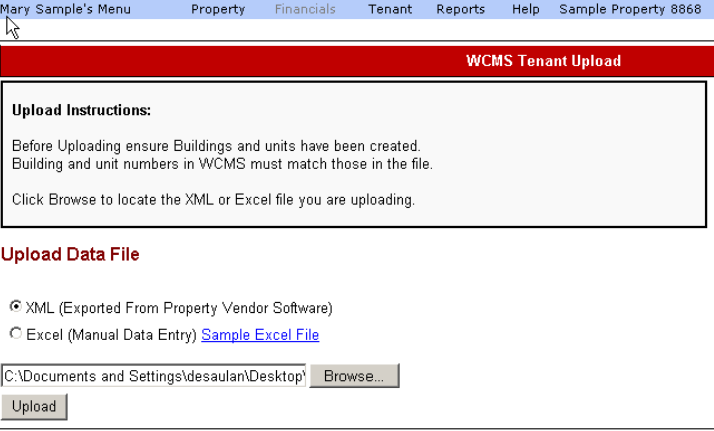
**Procedure** Complete these steps to upload tenant data to WCMS.

Step	Action
1	<p>After selecting a property, from the top menu select <b>Tenant, Tenant Upload</b>.</p>  <p><b>Note:</b> This feature will be grayed out if you don't have access to it. If you are trying this for the first time, contact VHDA for authorization at 804-343-5758.</p>
2	<p>The following <b>Tenant Upload</b> screen will open. You must have entered this screen under the property you wish to upload to.</p> 

*Continued on next page*

## Uploading Tenant Data from a File, Continued

Procedure (continued)

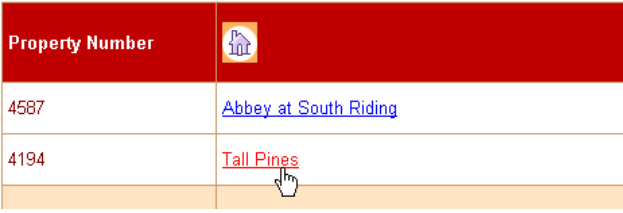
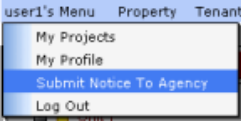
Step	Action
3	<p>Click on <b>Browse</b> to find your file on your computer. Once you select the correct file, click <b>Open</b>.</p> 
4	<p>The file path will appear in the open field below. Click <b>Upload</b> to process file. Depending on the size of your file it may take some time.</p> 
5	<p>Once completed, an error report will appear at the bottom of the screen. This report will let you know any issues with the file and which records were successfully processed.</p>
6	<p>Return to <b>My Projects</b> to refresh the data within WCMS and view as needed to ensure successful upload.</p>

## Notifying VHDA About New Tenant Data

**Overview**      **Optional – Not required by VHDA.**

When you update tenant data for the first time, use the **Submit Notice to Agency** feature to notify VHDA that compliance information for the specified property has been entered. This is not required for WCMS to automatically update VHDA's database.

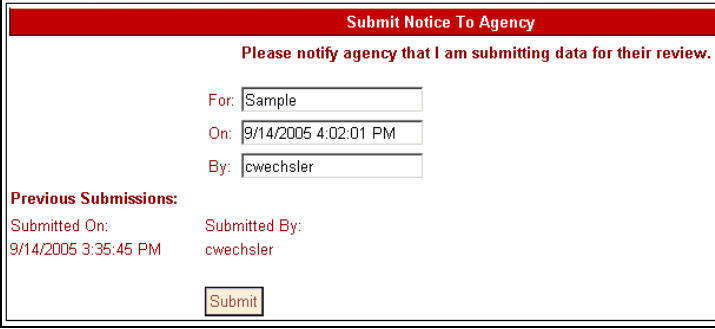
**Procedure**      Complete these steps to notify VHDA that you are submitting data for review.

Step	Action
1	<p>Ensure that the property you have updated is selected. (The currently selected property is displayed on the right side of the menu bar.)</p> <p style="text-align: center;"><b>Property: Abbey at South Riding 4587</b></p> <p>To select a different property, click on the user's menu and then select <b>My Projects</b>. Select the property from the list.</p> 
2	Click user's Menu
3	<p>Click <b>Submit Notice to Agency</b> on the user's menu.</p> 

*Continued on next page*

**Notifying VHDA About New Tenant Data, Continued**

Procedure (continued)

Step	Action
4	<p>The <b>Submit Notice to Agency</b> screen appears. The <b>For</b> field lists the currently selected Property; the <b>On</b> field lists the current date and time; and the <b>By</b> field lists your user name. Information about any of your previous submissions is listed in the lower left-hand portion of the screen.</p> 
5	<p>Click <b>Submit</b> to notify VHDA that you have added tenant information.</p>

## Working with Reports

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### Overview

This section contains the following topics.

Topic	See Page
WCMS Reports	64
Creating	65
Viewing and Printing	67
Forms	68

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## WCMS Reports

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**Overview** WCMS enables you to generate the following reports for a selected year or specified time period:

- Occupancy
- Demographics
- Occupancy and Demography

**Note:** You must have Adobe Acrobat Reader installed on your computer in order to create reports. Visit <http://www.adobe.com> to download Adobe Acrobat Reader or see your system administrator.

---

**Occupancy Report** The Occupancy Report, lists the following information for each unit in the project for the selected time period:

- head of household
  - move-in date
  - bedroom & household size
  - owner income designation
  - rent and utility allowance
  - household income
  - income limit area
- 

**Demographic Report** The Demographic Report lists the following information for each unit in the project for the selected time period:

- household's age category
  - ethnicity
  - occupation
  - disability category
- 

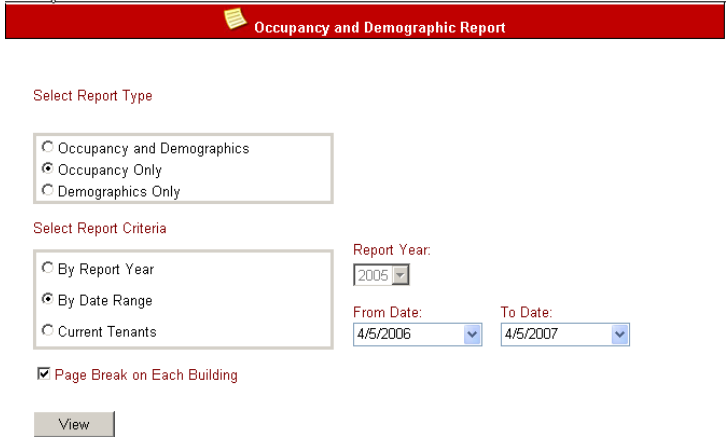
**Occupancy and Demographic Report** The Occupancy and Demography Report lists the following information for each unit in the project for the selected time period:

- head of household
  - move-in date
  - bedroom and household size
  - rent and utility allowance amount
  - household income
  - household's age, ethnicity, occupation, and disability category
-

## Creating

### Procedure

Complete these steps to create a report. Remember, you must have Adobe Acrobat Reader installed on your computer in order to create reports.

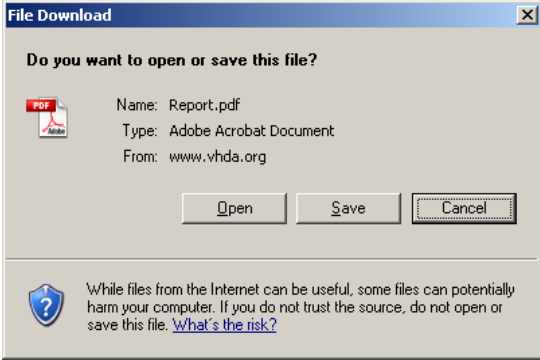
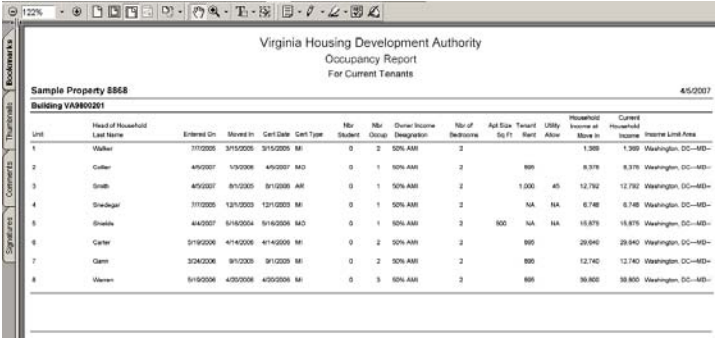
Step	Action
1	Click on a project in the <b>Assigned Projects</b> page. The <b>Project Information</b> screen appears.
2	Click <b>Occupancy Report</b> on the <b>Reports</b> menu.
3	<p>The <b>Occupancy and Demographic Report</b> screen appears.</p> 
4	Select the report type: <b>Occupancy, Demographics, or Both.</b>
5	<p>Select a time period.</p> <ul style="list-style-type: none"> <li>To view the information by year, select the <b>By Report Year</b> option and then choose the year from the dropdown list. This will include any tenants that have a certification during that year.</li> <li>To view the information for a specific period of time, select the <b>By Date Range</b> and then select the date range from the dropdown lists.</li> <li>Checking <b>Current Tenants</b> will give you the last activity for all Current Households.</li> <li>Checking <b>Page Break on Each Building</b> will create a new page for each building in your property.</li> </ul>

*Continued on next page*

# HDS WEB COMPLIANCE MANAGEMENT SYSTEM USER'S GUIDE

## Creating, Continued

### Procedure (continued)

Step	Action
6	<p>Click the <b>View</b> button. Your computer may display the following message. Click <b>Open</b> to view the report or <b>Save</b> to save a copy of the report in a specified folder on your computer.</p> 
7	<p>Adobe Acrobat Reader will open and display the report. Following is a sample Occupancy Report:</p> 
8	<p>Use the toolbar to change the view options, navigate through the pages, or print the report. See the following sections for instructions.</p>

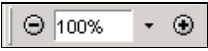


## Viewing and Printing

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**Overview** WCMS reports display in PDF format in Adobe Acrobat Reader. The toolbar at the top of the screen allows you to change the view and navigate through multiple pages. This section provides basic information for viewing and printing; refer to Acrobat Reader documentation for more detailed information.

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**Procedure** Complete these steps to change the view option for a report.

Step	Action
1	To increase or decrease the text size, click the plus or minus sign on the toolbar. To specify a percentage of the actual size, click the down arrow next to the percent field and then select from the list. 
2	Click the navigation arrows to navigate through multiple report pages:  The inner arrows navigate to the next and previous page; the outer arrows take you to the first and last pages.
3	Click the <b>Print</b> icon to display the <b>Print</b> dialog box where you can select print options and print the report. 


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# HDS WEB COMPLIANCE MANAGEMENT SYSTEM USER'S GUIDE

## Forms

### Overview

WCMS has an area within the system for VHDA to post forms and documents; however, this feature is not utilized by VHDA and therefore not available to users through WCMS. All forms and documents can be obtained from our Website [www.VHDA.com](http://www.VHDA.com).

Step	Action
1	<p>Under the Property tab you will see a drop down list of items to choose from and Forms is one of them. VHDA forms can only be obtained from our website <a href="http://www.vhda.com">www.vhda.com</a>. You should call your assigned Compliance Officer if you need assistance locating a particular form.</p>  <p>The screenshot shows a navigation menu with three tabs: 'Property Sample's Menu', 'Property', and 'Financials'. The 'Property' tab is active. A dropdown menu is open under 'Property', listing 'Property Info', 'Unit Vacancy', and 'Forms'. A mouse cursor is pointing at the 'Forms' option.</p>