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

Version 6

Virginia Housing Development Authority

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

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Version 6

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

Table of Contents

Introduction

Overview	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.
About WCMS	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.
About this Document	This document details the procedures that Property Management staff will follow for entering tenant information required for compliance.
Related Documentation	For additional information, refer to the *Web Compliance Management System User's Guide,* authored by HDS, available through the **Help** option on the menu bar.

Getting Started

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.

Accessing WCMS

Overview

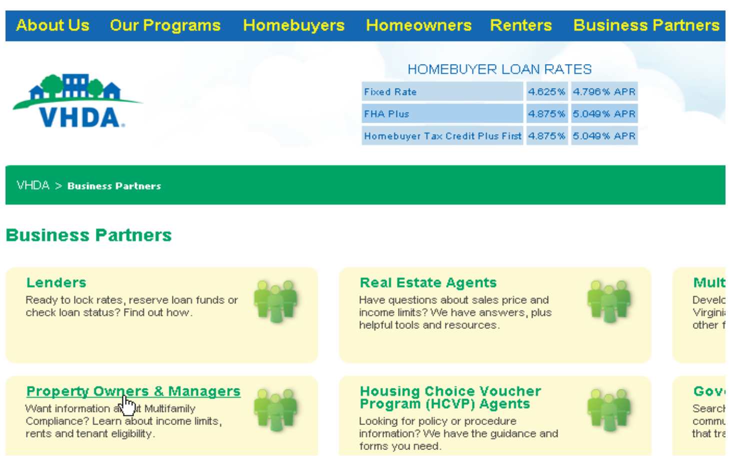
WCMS is accessible through any PC web browser. In order to access your assigned projects and begin working with WCMS, you must complete an online registration form and submit it to VHDA for approval. You will receive an email notification when your request has been approved. After you are approved, you 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.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Connect to the internet and open your browser. (This procedure will depend on the type of Internet connection you use and your browser software.)</td></tr>
<tr><td>2</td><td>Use your browser to navigate to www.vhda.com

</td></tr>
<tr><td>3</td><td>The VHDA home page appears. Click the Business Partners link and it will take you to the screen below. Click on Property Owners & Managers link.



</td></tr>
</table>

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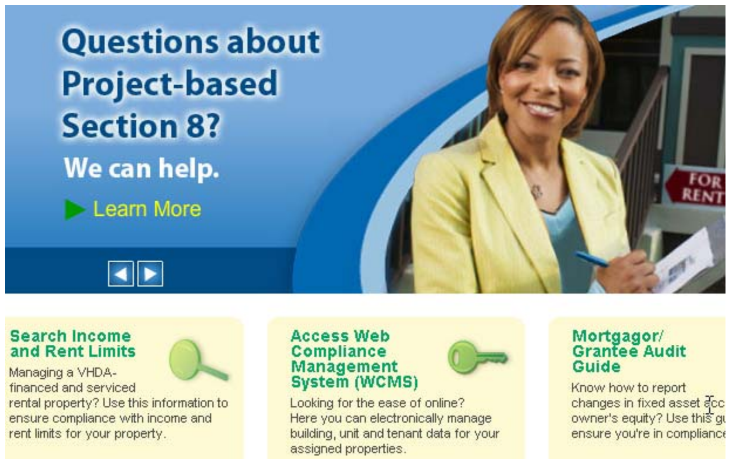
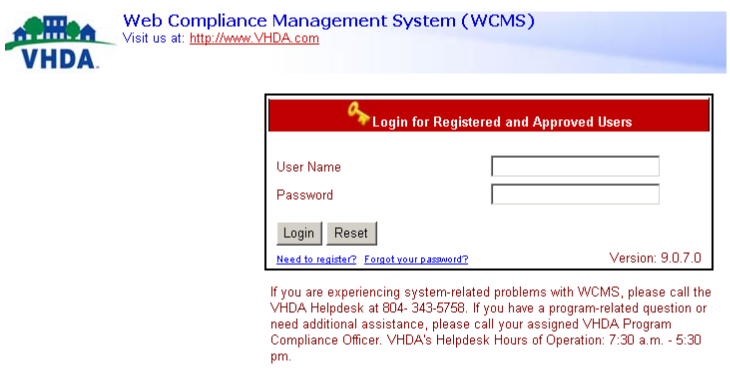
Accessing WCMS, Continued

Procedure (continued)

Step	Action
4	Click the **Access Web Compliance Management System (WCMS)** link on this screen. 
5	The **Log in** window for WCMS will appear. Messages from VHDA will appear at the bottom of the screen. 

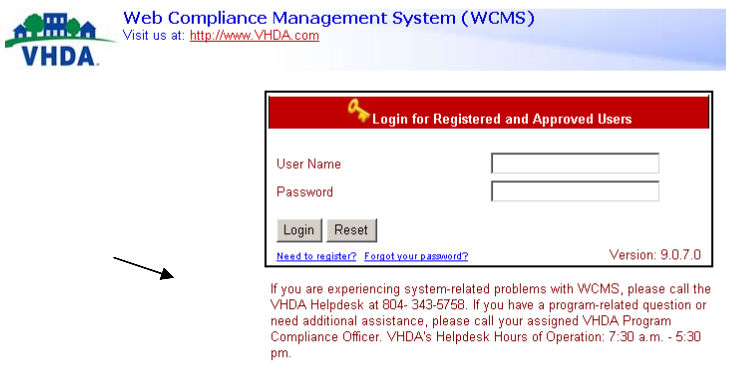
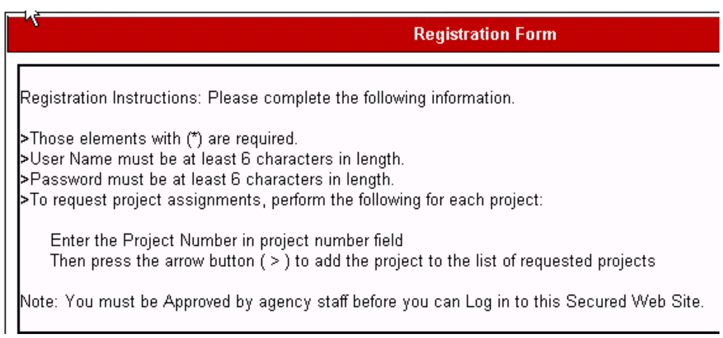
Requesting a WCMS Account

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	Click Need to Register? to access the **Registration** link on the **Log in** window. 
3	The **Registration** window displays instructions and fields for entering your account information. 

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Requesting a WCMS Account, Continued

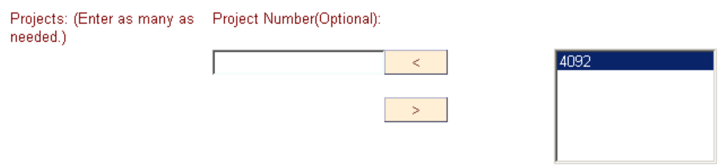
Procedure (continued)

Step	Action
4	Use the guidelines in the registration instructions at the top of the screen to enter the following information about yourself: • name • organization • address and telephone number • fax number (optional) • email address • 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. • password (this is the password assigned to the user name you created) **Note**: Make a note of the upper case/lower case combination that you enter in the **User Name** and **Password** fields on the registration form; you will need to enter them the same way when you log in to WCMS later.
5	Type your password a second time in the **Confirm Password** field.
6	From the dropdown, select a role that most closely resembles your role with the property.
7	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. **Note**: 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.

Continued on next page

Requesting a WCMS Account, Continued

Procedure (continued)

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

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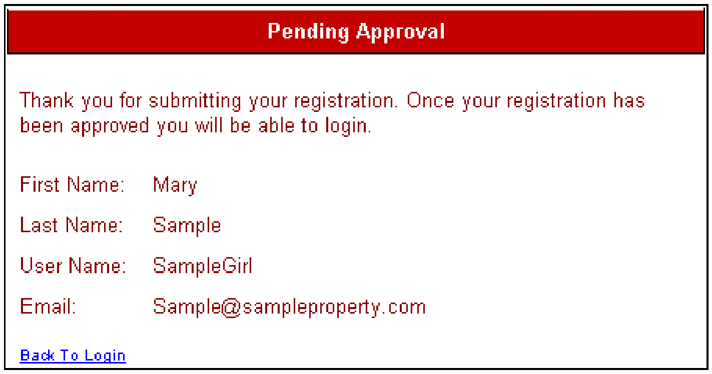
Requesting a WCMS Account, Continued

Procedure (continued)

Step	Action
11	Your registration request is submitted to VHDA for approval. A confirmation window shows the information you entered. 
12	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.
13	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.

Logging In

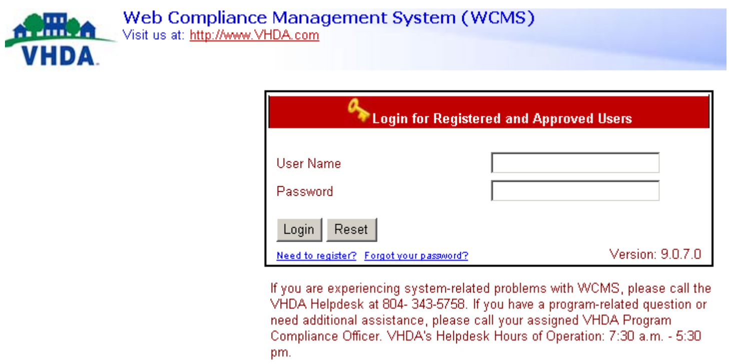
Overview

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.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Open Internet Explorer and navigate to the WCMS application (refer to "Accessing WCMS" on page 3.)</td></tr>
<tr><td>2</td><td>The Log in window will display. Enter your user name and password and then click Login.


Note: 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.</td></tr>
</table>

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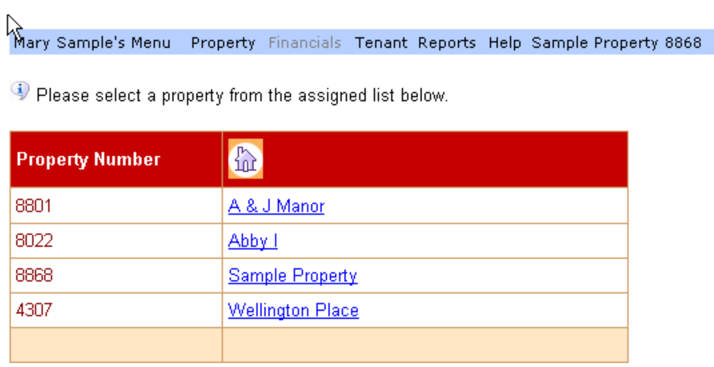
Logging In, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>If you forget your password, click Forgot your Password? and Password Assistance will open.

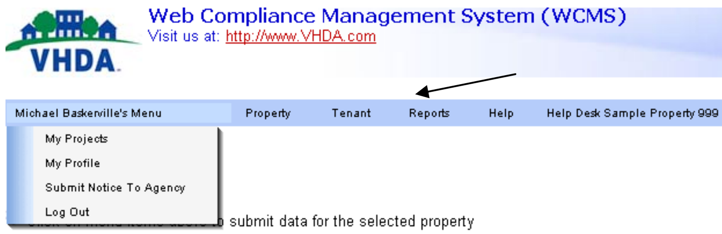

Enter your user name and email address. This email address must be the same as in your profile. A temporary password will be mailed to the email address listed on your profile. Once you have logged in to WCMS, go to My Profile and change your password.

If you forget your user name, Do not re-register. Contact your Program Compliance Officer for assistance.</td></tr>
<tr><td>4</td><td>The Assigned Properties screen displays the name and number of each property to which you have been granted access.

</td></tr>
</table>

Logging Out

Procedure

Complete these steps to log out of WCMS.

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

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.

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Property Number	
8801	A & J Manor
8022	Abby I
8868	Sample Property
4307	Wellington Place

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.

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Navigating, Continued

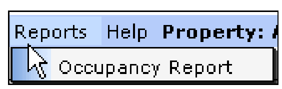
Menu Bar (continued)

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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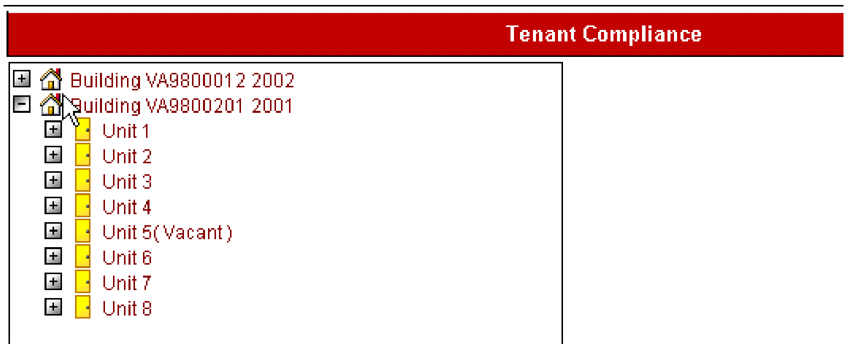
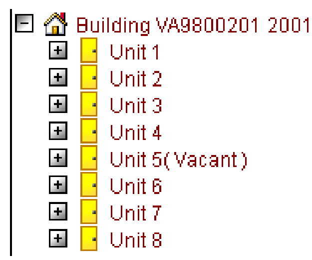
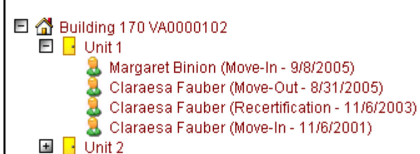
Navigating, Continued

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.



<table>
<tr>
<td>Click the plus sign next to a building to view the units belonging to the building.</td>
<td>
</td>
</tr>
<tr>
<td>Click the plus sign next to a unit to view the tenant certifications for the unit.

Click the minus sign to collapse the tree.</td>
<td>
</td>
</tr>
</table>

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

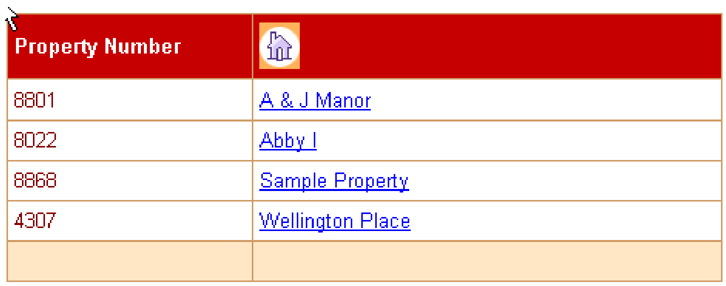
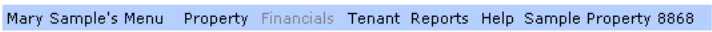
Assigned Properties

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.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Log in to WCMS with your user name and password. The Assigned Properties screen appears.

</td></tr>
<tr><td>2</td><td>Click on a property link. The name displays on the menu bar.

</td></tr>
</table>

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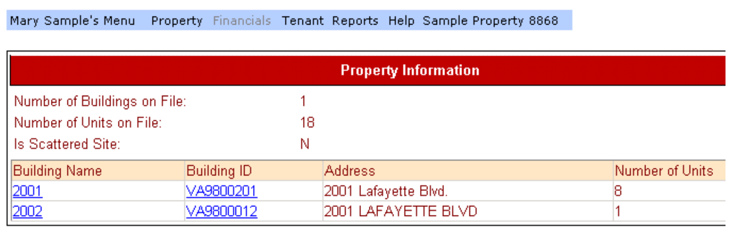
Viewing Property Information, Continued

Procedure (continued)

Step	Action
3	Click the property name in the menu bar or click **Property Info** on the **Property** menu.
4	The **Property Information** 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. 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. 
5	To switch to another project, click **My Projects** on the user's menu and then choose from the **Assigned Projects** list.

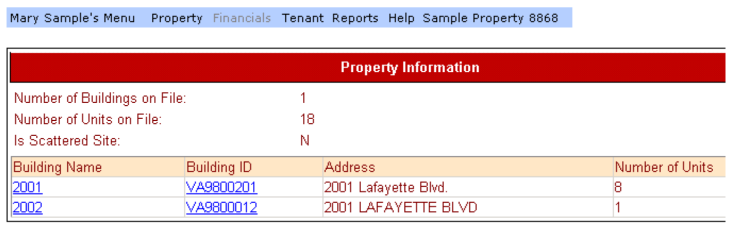
Working with Units

Overview

This section contains the following topics.

Viewing Building Information

Procedure Complete these steps to view building information.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select a project and then click the Property Info link on the Property menu. The Property Information screen appears.</td></tr>
<tr><td>2</td><td>Click on the building in the Building Name or Building ID column to view building's unit information.

</td></tr>
</table>

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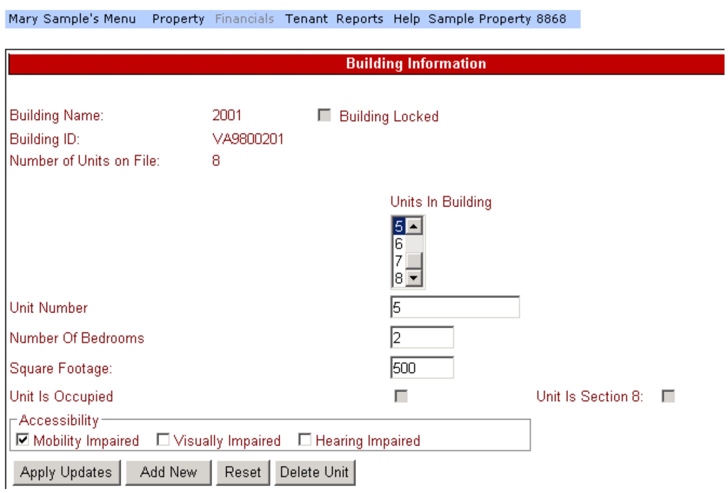
Viewing Building Information, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
The Building Information 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.
Once all of your unit details have been verified, the building will be locked (the Building Locked 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.
The Units in Building 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.

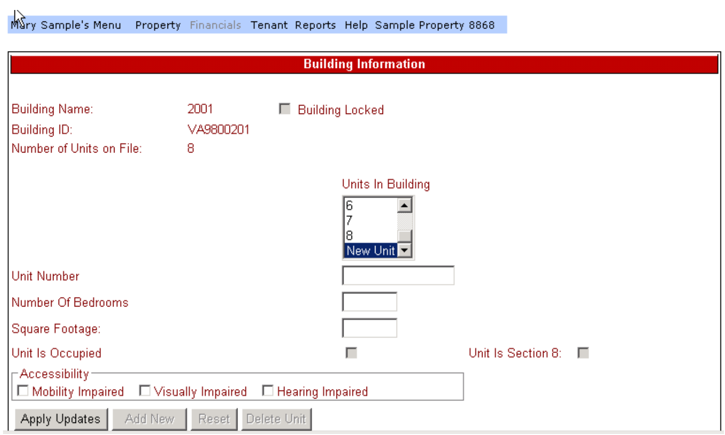


</td></tr>
<tr><td>4</td><td>See the following sections for procedures on working with units.</td></tr>
</table>

Adding a Unit

Procedure

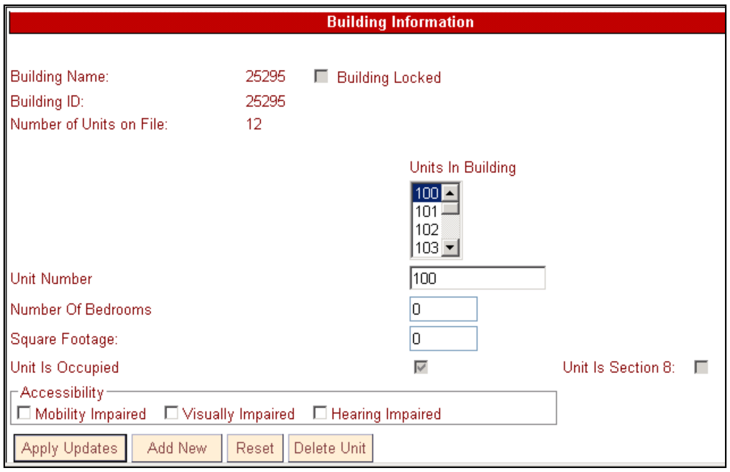
Complete these steps to add a unit. The property or building must not already contain the full number of units as indicated in VHDA systems.

Step	Action
1	Navigate to the **Property Information** 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 **Building Information** screen displays. The **Units in Building** field lists all units already entered into the system. Click **Add New**. 
3	Enter the **Unit Number** 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 **Accessibility** boxes.
7	When you finish entering the unit information, click **Apply Updates**. The unit will now display in the **Tenant Compliance** 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 **Property Information** 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 **Building Information** screen displays. 
3	Select the unit you want to modify in the **Units in Building** list box.
4	Edit the information and then click **Apply Updates** to save your changes.

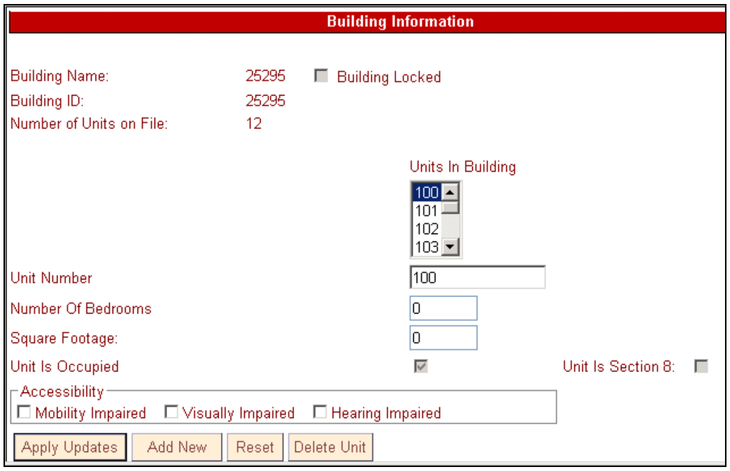
Deleting a Unit

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.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to the Property Information screen. (See "Viewing Property Information" on page 16 for instructions.)</td></tr>
<tr><td>2</td><td>Click on the building in the Building Name or Building Number column to which the unit belongs. The Building Information screen displays.



</td></tr>
<tr><td>3</td><td>Select the unit you want to modify in the Units in Building list box.</td></tr>
<tr><td>4</td><td>Click Delete Unit.</td></tr>
<tr><td>5</td><td>The unit is deleted from the system.

Note: 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.
The unit 100 has tenants in it, could not delete unit</td></tr>
</table>

Optional Procedure - Recording Unit Vacancies

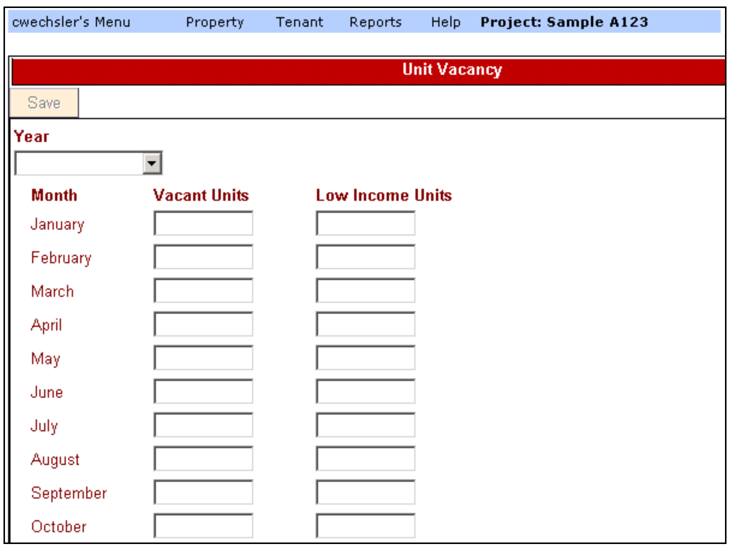
Overview

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.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to the Property Information screen. (See “Viewing Property Information” on page 16 for instructions.)</td></tr>
<tr><td>2</td><td>Click on the building name for which you want to view unit vacancies.</td></tr>
<tr><td>3</td><td>Click Unit Vacancy on the Property menu. The Unit Vacancy screen appears.



</td></tr>
<tr><td>4</td><td>Select the Year from the dropdown menu (new years are added into VHDA systems by your Program Compliance Officer).</td></tr>
<tr><td>5</td><td>Enter the number of Vacant and or Low Income Units for the property in the appropriate month.</td></tr>
<tr><td>6</td><td>Click Save to save your changes.</td></tr>
</table>

Working with Tenants

Overview

This section contains the following topics.

Viewing Tenant Information

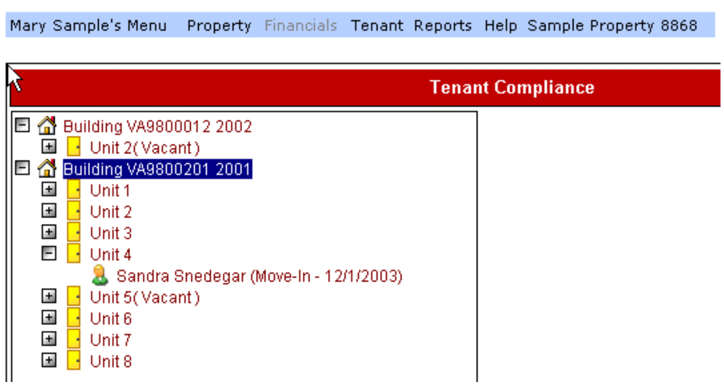
Overview

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 **Assigned Projects** screen and select the project from the list. The **Project Information** screen displays.
2	Click **Tenant Compliance** under **Tenant** on the menu bar.
3	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. 

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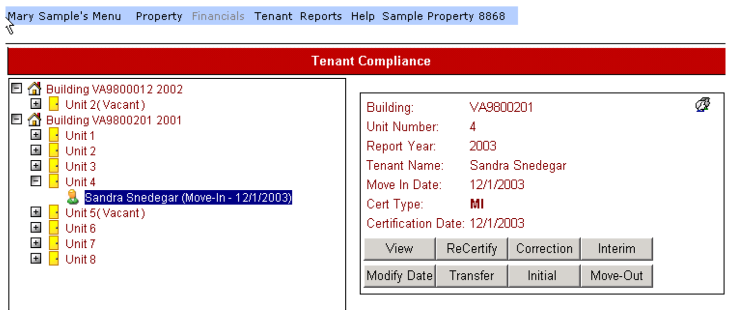
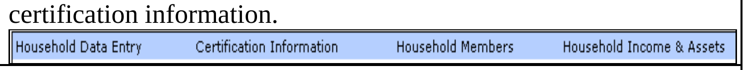
Viewing Tenant Information, Continued

Viewing Tenant Information (continued)

Step	Action
4	Click on the tenant certification you want to view. General certification information will display on the right side of the screen as illustrated below. 
5	Click the **View** button to view details of the tenant certification.
6	The Household Data Entry screen displays basic household data. Use the menu bar at the top of the screen to view additional certification information. 
7	The following sections describe each of the screens that contain a tenant record.

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Viewing Tenant Information, Continued

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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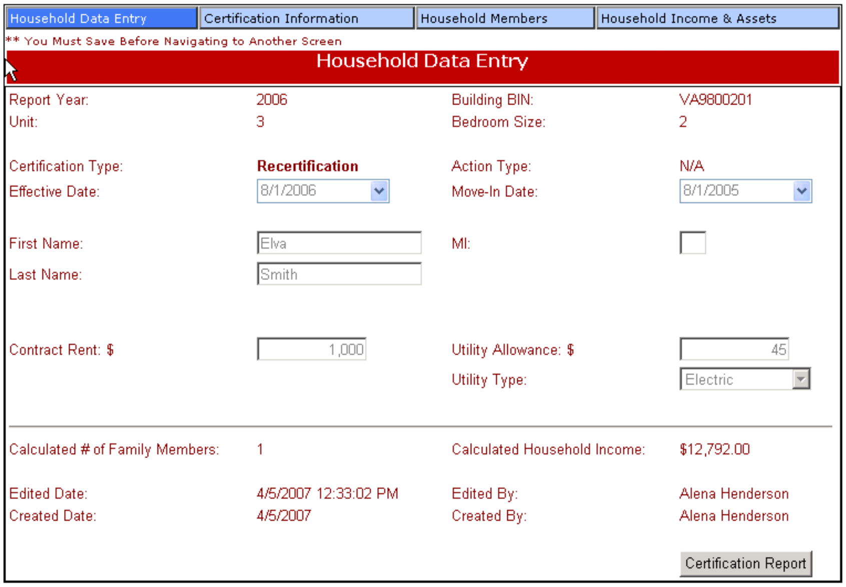
Viewing Tenant Information, Continued

Household Data Entry (continued)

Following is a sample **Household Data Entry** screen.



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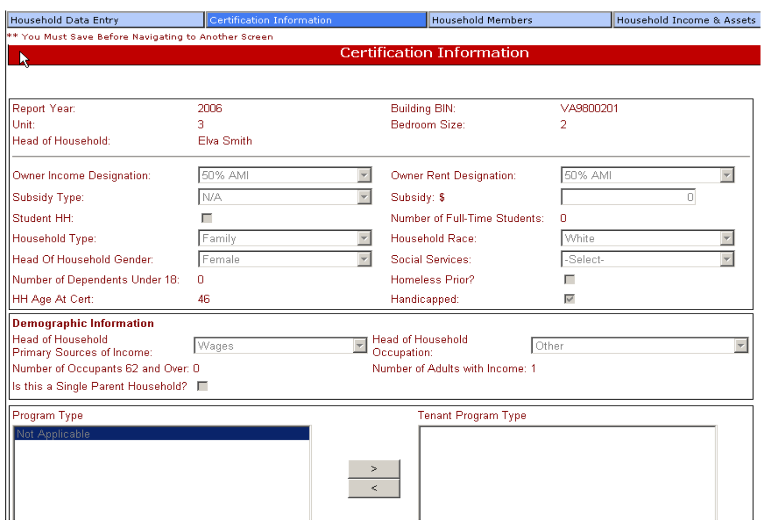
Certification Information

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.



Viewing Tenant Information, Continued

Household Members

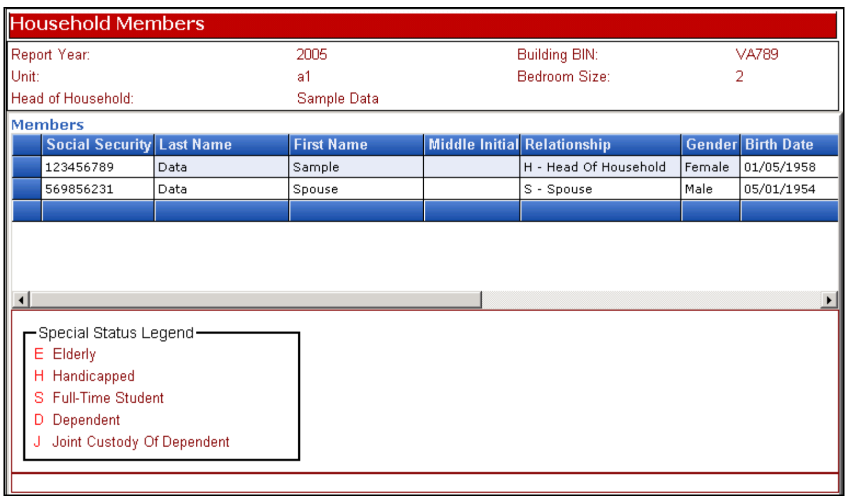
The **Household Members** screen captures details of individuals living in a selected unit. The blue fields on this screen show Head of Household information captured previously on the Household Data Entry Screen and Certification Information screen. Any required changes to this information must be made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



Continued on next page

Viewing Tenant Information, Continued

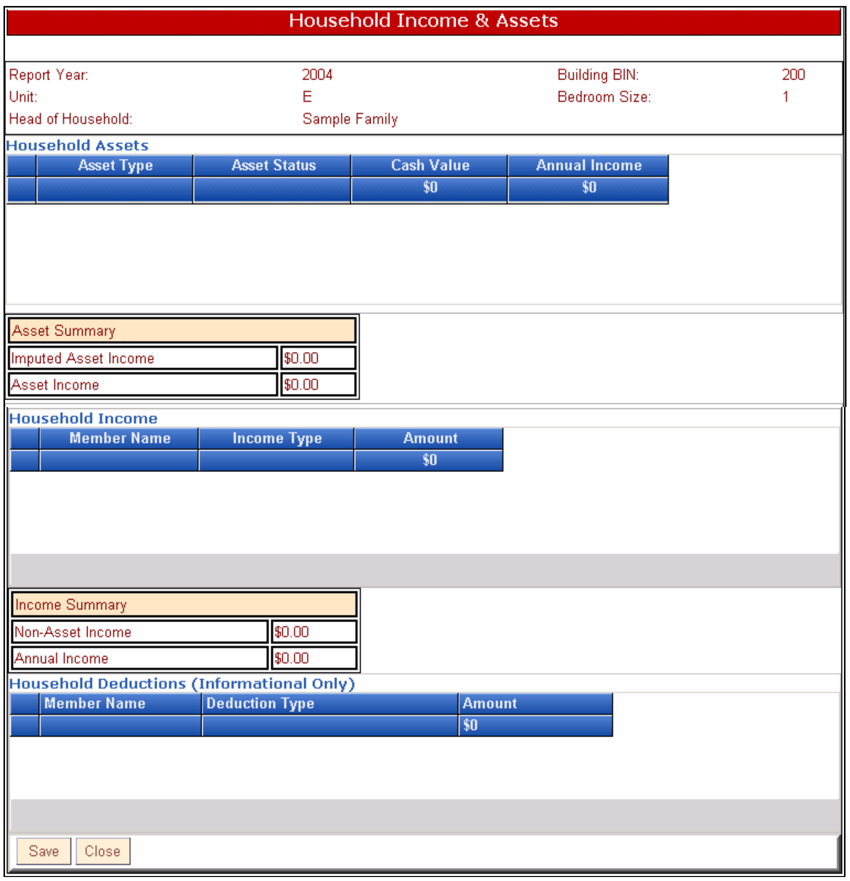
Household Income and Assets

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.



Moving In a Tenant

Overview

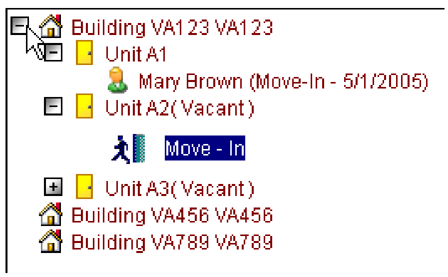
To move in a tenant, enter tenant information using the following screens, which are accessible through the menu bar on the **Tenant Compliance** window:

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

Complete the following steps to move in a tenant.

Entering Household Data

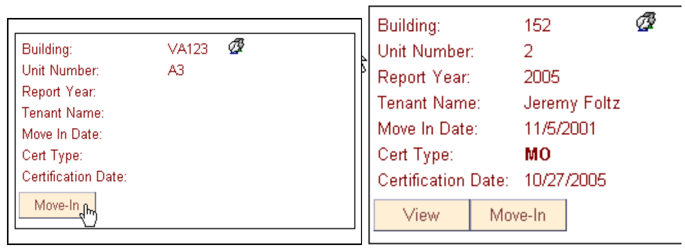
Complete these steps to enter household information.

Step	Action
1	Navigate to the unit. See "Viewing Tenant Information" on page 26 for instructions.
2	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.) 

Continued on next page

Moving In a Tenant, Continued

Entering Household Data (continued)

Step	Action
3	The area to the right displays the Building and Unit Number. Click the **Move-In** button.  **Note**: If the **Move In** 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.
4	The **Household Data Entry** screen will display. (Refer to "Household Data Entry" on page 28 for more information about this screen.) 

Continued on next page

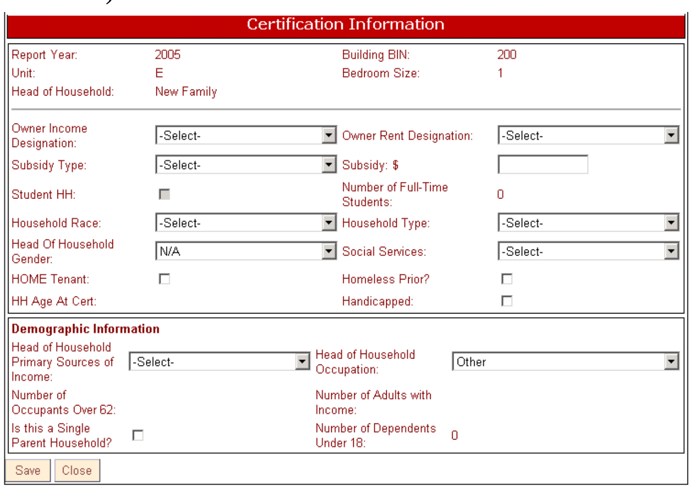
Moving In a Tenant, Continued

Entering Household Data (continued)

Step	Action
5	Select an **Effective Date** 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 **Move In** 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 **Save**. The system will automatically fill in the **Entered Date** and **Entered By** 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 **Certification Information** on the menu bar.
2	The **Certification Information** screen will display. (Refer to "Certification Information" on page 30 for more information about this screen.) 

Continued on next page

Moving In a Tenant, Continued

Entering Certification Information (continued)

Step	Action
3	Select the **Owner Income Designation** 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 **Owner Rent Designation** 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 **Subsidy Type** field and enter the amount in the **Subsidy Amount** field.
6	Select the household type from the dropdown list in the **Household Type** Field if it is applicable.
7	Select the racial designation of the household from the dropdown list in the **Household Race** field.
8	Select the Head of Household's **Gender** from the dropdown list.
9	If the tenant was homeless directly prior to moving into the unit, check the **Homeless Prior?** checkbox.
10	If any member of the household is designated as handicapped, check the **Handicapped** checkbox.
11	Now you can add demographic information: • Select the Head of Household's primary sources of income. • Select the head of household's occupation from the dropdown list. • If applicable, check the **Single Parent Household?** checkbox.
12	Ignore Program Types at the bottom of the page. VHDA does not utilize that field.
13	Click **Save**.
14	Now add the Household Member information. (See the next section for instructions.)

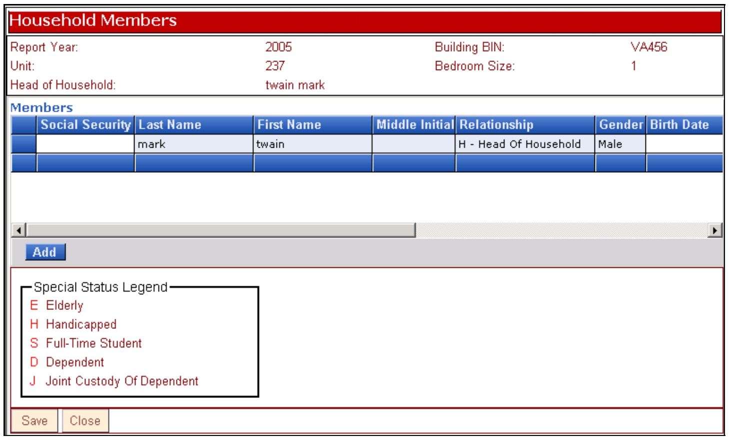
Continued on next page

Moving In a Tenant, Continued

Entering Household Member Information

Complete these steps to enter Household Member information.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click Household Members on the menu bar at the top of the screen.</td></tr>
<tr><td>2</td><td>The Household Members screen will display. (Refer to "Household Members" on page 31 for more information about this screen.)


</td></tr>
<tr><td>3</td><td>The head of household's name appears in the Members area. Click in the Social Security field and type the tenant's Social Security number.</td></tr>
<tr><td>4</td><td>Use the Tab key on the keyboard to navigate to the other columns and enter any information you have for this household member.

Note: The Gender, Race, and Ethnicity 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.

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.</td></tr>
</table>

Continued on next page

Moving In a Tenant, Continued

Entering Household Member Information (continued)

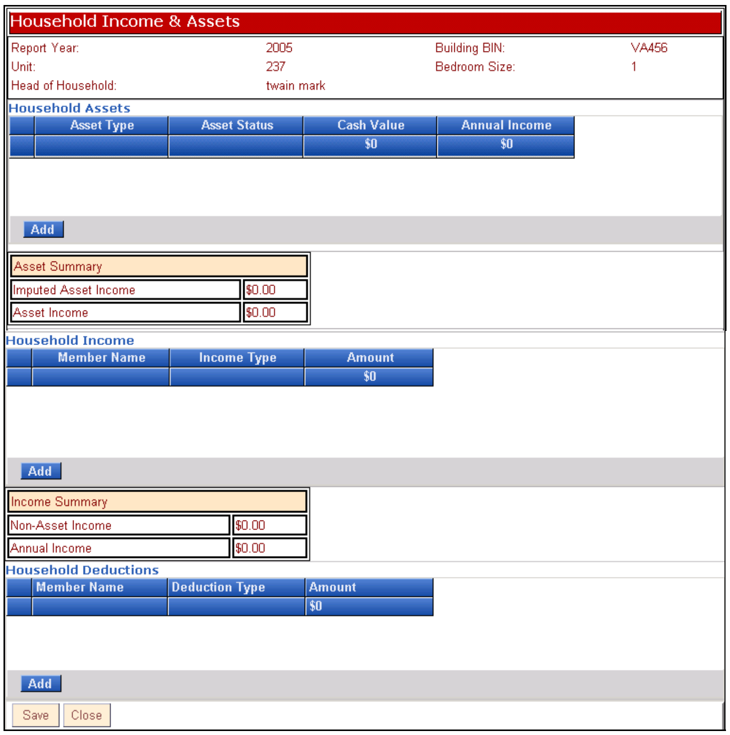
Step	Action
5	To add additional household members, click **Add**. A blank row appears. Enter any information you have for each member (Social Security number and Date of Birth are required fields). Indicate the household member's relationship to the head of household by selecting from the **Relationship**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

Continued on next page

Moving In a Tenant, Continued

Entering Household Income & Assets

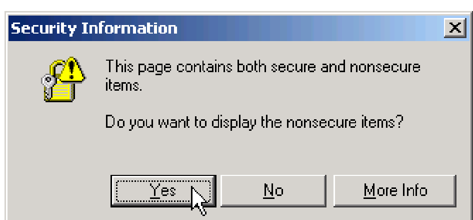
Household assets are any bank accounts and real estate properties owned, or annuities received, by members of the household. Complete these steps to enter Household Income and Assets information.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click Household Income &Assets on the menu bar at the top of the screen.</td></tr>
<tr><td>2</td><td>The Household Income & Assets screen will display. (Refer to “Household Income and Assets” on page 32 for more information about this screen.)

</td></tr>
<tr><td>3</td><td>Click Add in the Household Assets area to enter any assets. A new blank row appears.</td></tr>
<tr><td>4</td><td>Select the Asset Type and Asset Status from the dropdown lists. The status will either be “Average”, “Current”, or “Imputed” (meaning that it was disposed of within the last two years).</td></tr>
</table>

Continued on next page

Moving In a Tenant, Continued

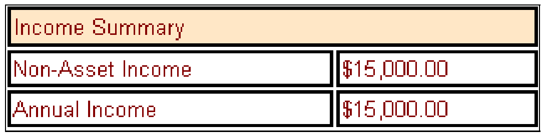
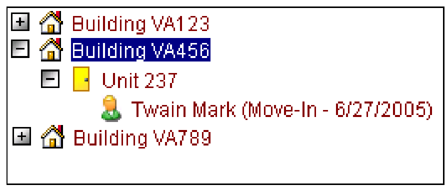
Entering Household Income & Assets (continued)

Step	Action
5	Enter the **Cash Value** and **Annual Income.** **Note: DO NOT INCLUDE ANY DECIMALS in your entry (i.e. 10.00 or 2.54). Round up to the nearest dollar.**
6	Click **Add** for each asset you enter.
7	Now add the household income information for each member. Click **Add**. A new blank row appears.
8	Click in the **Member Name** field and select a household member from the dropdown list.
9	Select the member's **Income Type** from the dropdown list.
10	Enter the amount of annual income this household member receives or expects from this income type. **Note: DO NOT INCLUDE ANY DECIMALS in your entry (i.e. 10.00 or 2.54)**
11	Enter any deductions for any household members in the **Household Deductions** area. Select the household member's name and the deduction type from the dropdown list, and then enter the amount of the deduction. **Note:** 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 **Delete** key on your keyboard. The system will delete the row and may display a security message. Click **Yes** to close the message. 

Continued on next page

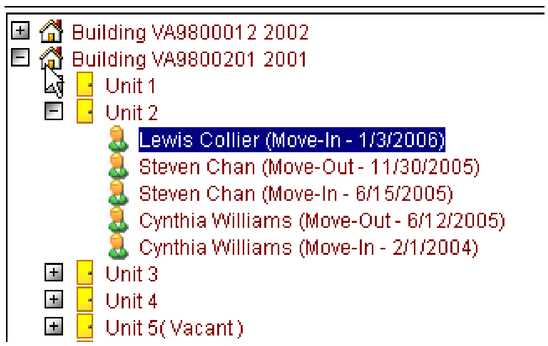
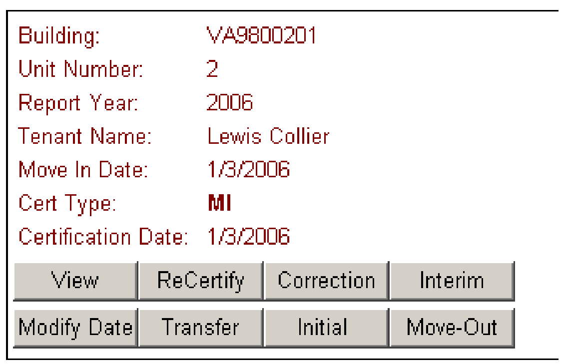
Moving In a Tenant, Continued

Entering Household Income & Assets (continued)

Step	Action
13	Click **Save**. The system calculates the total for each category and displays a summary in each grid. 
14	Click **Close** to close the tenant record and refresh our data. The Move-In Certification will now display in the **Tenant Compliance** tree. 
15	WCMS is a direct link to VHDA's Database. Entering information here automatically updates our system.

Moving Out a Tenant

Procedure Complete these steps to move out a tenant.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to the unit. See "Viewing Tenant Information" on page 26 for instructions.</td></tr>
<tr><td>2</td><td>Click the plus sign next to the unit, and then select the tenant record at the top of the list.

</td></tr>
<tr><td>3</td><td>The area to the right displays a summary of the Certification information. Ensure you are on the correct tenant record. Click the Move-Out button.

</td></tr>
</table>

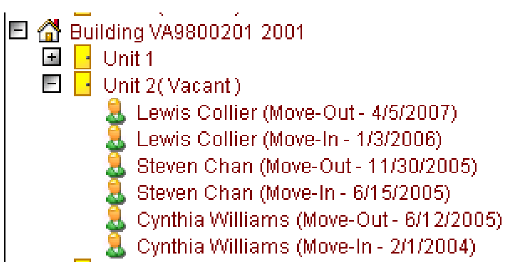
Continued on next page

Moving Out a Tenant, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>The Household Data Entry screen displays. It displays all of the information contained in the record you selected, but the Certification Type is now listed as "Move-Out".

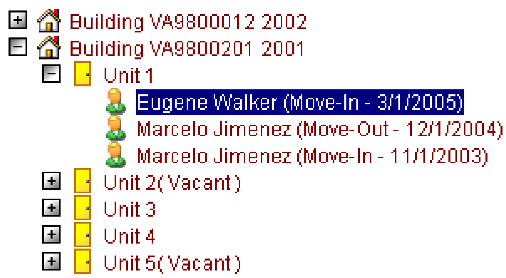
</td></tr>
<tr><td>5</td><td>Ensure that this is the correct Household. Enter the move-out date in the Effective Date field and make any other necessary changes.</td></tr>
<tr><td>6</td><td>Click Save.</td></tr>
<tr><td>7</td><td>When you finish entering and saving all changes, click Close.</td></tr>
<tr><td>8</td><td>The Move-Out Certification will now display in the Tenant Compliance tree and the unit will indicate (Vacant).



</td></tr>
</table>

Certifying a Tenant

Procedure Complete these steps to certify a tenant.

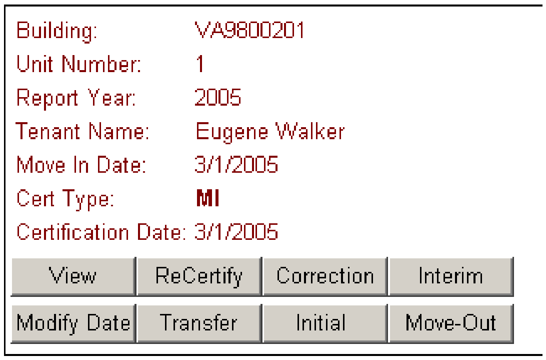
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to the unit. See "Viewing Tenant Information" on page 26 for instructions.</td></tr>
<tr><td>2</td><td>Click on the plus sign next to the unit, and then select the tenant record at the top of the list. This is the most recent tenant record.

</td></tr>
</table>

Continued on next page

Certifying a Tenant, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>The area to the right displays a summary of the Certification information. Click the appropriate button to select the certification type: Initial, Interim, or ReCertify.



Initial creates an initial certification that will replace the move-in income information for all compliance testing.
Interim is used to track events outside of the recertification process such as changes in household.
Recertify is used to process annual or 3 year certifications on the household. You will be able to update the household at that time.

Note: 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.</td></tr>
<tr><td>4</td><td>The Household Data Entry screen will appear. It displays all of the information contained in the record you selected, but the Certification Type is now listed as the type you selected.</td></tr>
</table>

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 **Save**. (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 **Certification Information**, **Household Members**, and **Household Income & Assets** 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.) **Note**: Click **Save** before leaving each screen. Tax Exempt Properties should process an initial with any changes to the household composition.
	Note: If you need to change the Head of Household, open the **Household Data** screen and edit the **Name** 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 **Household Members** screen and delete the member row. Then, edit the values related to the new Head of Household on the **Certification Information** screen.
7	When you finish entering and saving all changes, click **Close**.
8	The new certification will display in the **Tenant Compliance** tree.

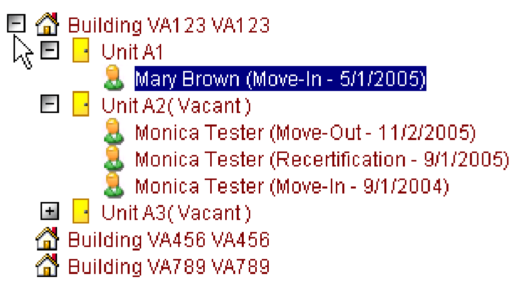
Modifying a Tenant Certification

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

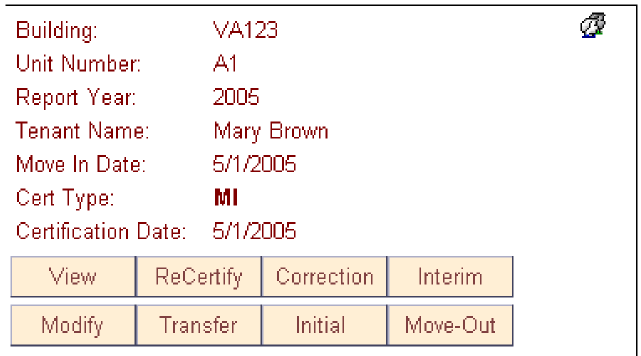
Complete these steps to modify a tenant certification.

Step	Action
1	Navigate to the unit. See "Viewing Tenant Information" on page 26 for instructions.
2	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. 

Continued on next page

Modifying a Tenant Certification, Continued

Procedure (continued)

Step	Action
3	The area to the right displays a summary of the Certification information. Click the **Modify** button. 
4	The **Household Data Entry** screen will appear. It displays all of the information contained in the record you selected.
5	Make any necessary changes to the household data information and then click **Save**. (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 **Certification Information**, **Household Members**, and **Household Income & Assets** 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.) **Note**: Please be sure to click **Save** only on the screen that you modified the data.
7	When you finish entering and saving all changes, click **Close**. Your previous record will now contain the updated information without creating a new certification.

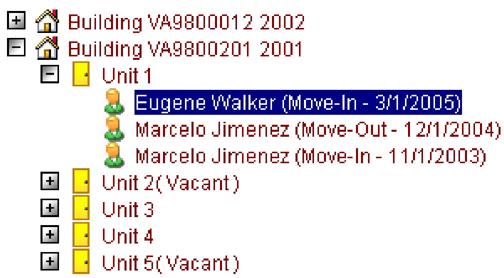
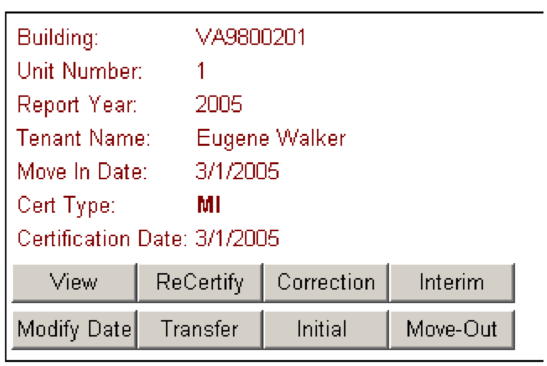
Modifying the Effective Date

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.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to the unit. See "Viewing Tenant Information" on page 26 for instructions.</td></tr>
<tr><td>2</td><td>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.

</td></tr>
<tr><td>3</td><td>The area to the right displays a summary of the Certification information. Click the Modify Date button.

</td></tr>
<tr><td>4</td><td>The Household Data Entry screen will appear. It displays all of the information contained in the record you selected.</td></tr>
</table>

Continued on next page

Modifying the Effective Date, Continued

Procedure (continued)

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

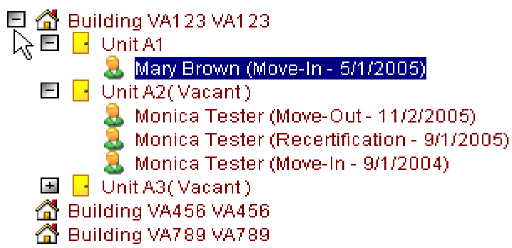
Correcting a Tenant Certification

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

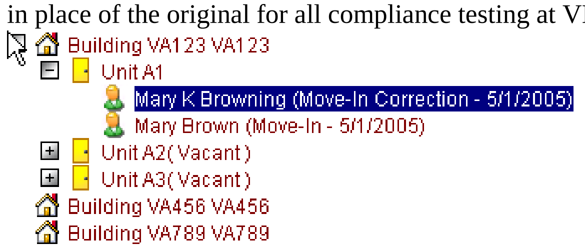
Complete these steps to correct a Tenant Certification.

Step	Action
1	Navigate to the unit. See "Viewing Tenant Information" on page 26 for instructions.
2	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. 
3	The area to the right displays a summary of the Certification information. Click the **Correction** button.
4	The **Household Data Entry** screen will appear. It displays all of the information contained in the record you selected.
5	Make any necessary changes to the household data information and then click **Save**. (Refer to "Entering Household Data" on page 33 for detailed instructions on entering information on this screen.) **Note**: You must be sure to save on this screen as it establishes the corrected certification in the household. Please note to select **Save** only on those screens with changes.
6	Use the menu bar at the top of the screen to navigate to **Certification Information**, **Household Members**, and **Household Income & Assets** 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.)

Continued on next page

Correcting a Tenant Certification, Continued

Procedure (continued)

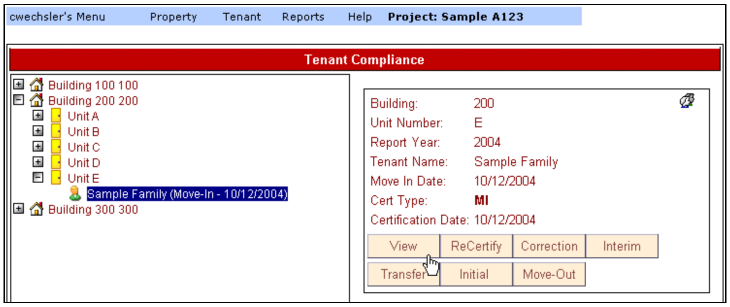
Step	Action
7	When you finish entering and saving all changes, click **Close**. **NOTE**: In order to see your correction, refresh WCMS by selecting project again.
8	The corrected certification will display in the Tenant Compliance tree above the original certification. This information will be used in place of the original for all compliance testing at VHDA.  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 **Tenant** and **Tenant Compliance**, then the applicable **Building** and **Unit**. You should now see the corrected certification.

Printing a Tenant Certification

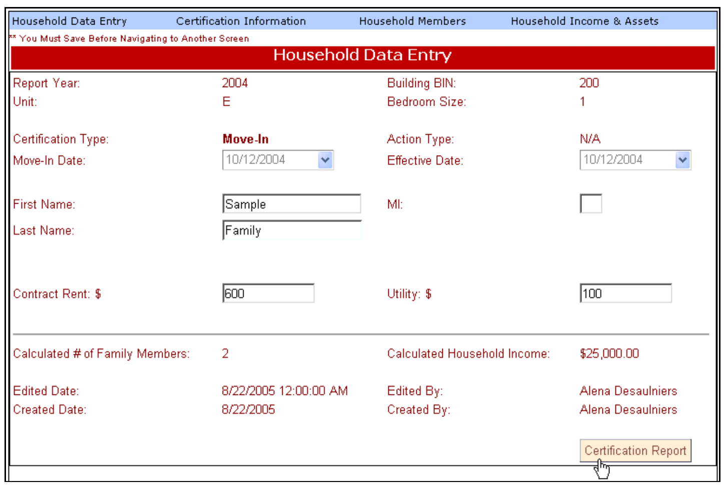
Overview Tenant certification information is available on the WCMS screens or can be viewed in report format and printed.

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

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to the unit. See "Viewing Tenant Information" on page 26 for instructions.</td></tr>
<tr><td>2</td><td>Click the plus sign next to the unit, and then select the tenant record and then click View to view the certification. You can also request this report after entering data and saving any certification.



</td></tr>
<tr><td>3</td><td>Click Certification Report on the Household Data Entry screen.



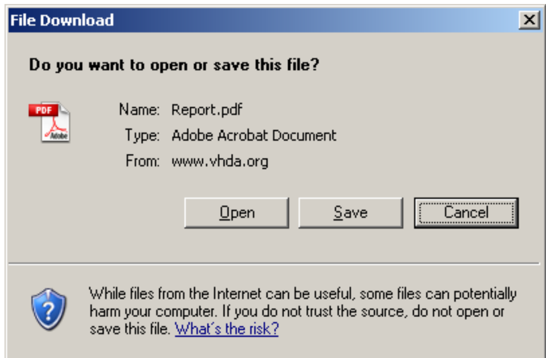
</td></tr>
</table>

Continued on next page

Printing a Tenant Certification, Continued

Procedure (continued)

Step	Action
4	The system will display a file download message asking if you want to open or save the file. Select **Open**.

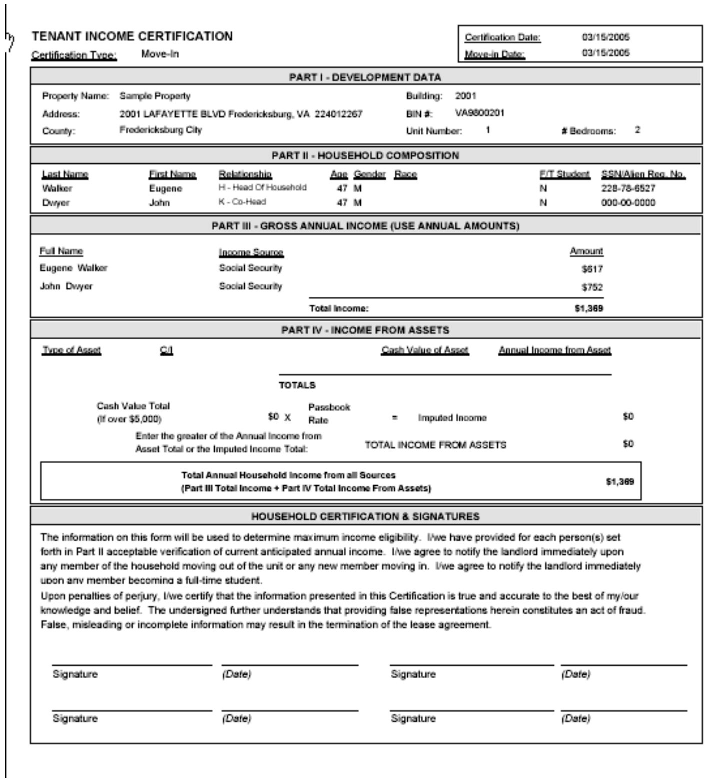


Continued on next page

Printing a Tenant Certification, Continued

Procedure (continued)

Step	Action
5	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.) **Page 1**



TENANT INCOME CERTIFICATION

Certification Type: Move-In

Certification Date: 03/15/2005
Move-in Date: 03/15/2005

PART I - DEVELOPMENT DATA

Property Name: Sample Property — Building: 2001
Address: 2001 LAFAYETTE BLVD Fredericksburg, VA 224012267 — BIN #: VA9800201
County: Fredericksburg City — Unit Number: 1 — # Bedrooms: 2

PART II - HOUSEHOLD COMPOSITION

Last Name	First Name	Relationship	Age	Gender	Race	F/T Student	SSN/Alien Reg. No.
Walker	Eugene	H - Head Of Household	47	M		N	228-78-6527
Dwyer	John	K - Co-Head	47	M		N	000-00-0000

PART III - GROSS ANNUAL INCOME (USE ANNUAL AMOUNTS)

Full Name	Income Source	Amount
Eugene Walker	Social Security	$617
John Dwyer	Social Security	$752
	Total Income:	$1,369

PART IV - INCOME FROM ASSETS

Type of Asset	C/I	Cash Value of Asset	Annual Income from Asset

TOTALS

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: TOTAL INCOME FROM ASSETS $0

Total Annual Household Income from all Sources (Part III Total Income + Part IV Total Income From Assets) $1,369

HOUSEHOLD CERTIFICATION & SIGNATURES

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.

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.

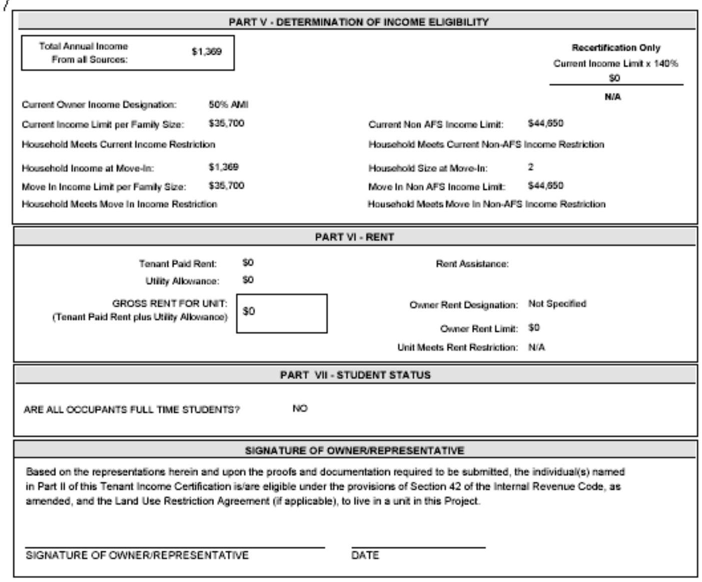
Signature (Date) Signature (Date)

Signature (Date) Signature (Date)

Continued on next page

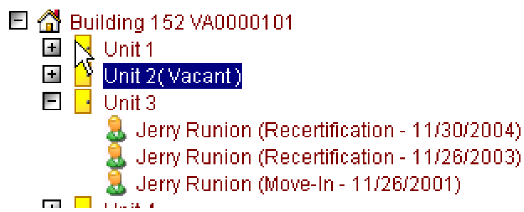
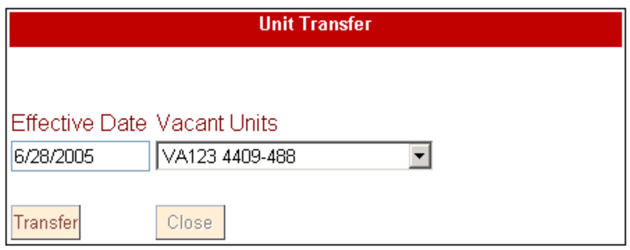
Printing a Tenant Certification, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>Page 2

PART V - DETERMINATION OF INCOME ELIGIBILITY
Total Annual Income From all Sources: $1,369
Recertification Only
Current Income Limit x 140%
$0
N/A
Current Owner Income Designation: 50% AMI
Current Income Limit per Family Size: $35,700
Current Non AFS Income Limit: $44,650
Household Meets Current Income Restriction
Household Meets Current Non-AFS Income Restriction
Household Income at Move-In: $1,369
Household Size at Move-In: 2
Move In Income Limit per Family Size: $35,700
Move In Non AFS Income Limit: $44,650
Household Meets Move In Income Restriction
Household Meets Move In Non-AFS Income Restriction
PART VI - RENT
Tenant Paid Rent: $0
Rent Assistance:
Utility Allowance: $0
GROSS RENT FOR UNIT: (Tenant Paid Rent plus Utility Allowance) $0
Owner Rent Designation: Not Specified
Owner Rent Limit: $0
Unit Meets Rent Restriction: N/A
PART VII - STUDENT STATUS
ARE ALL OCCUPANTS FULL TIME STUDENTS? NO
SIGNATURE OF OWNER/REPRESENTATIVE
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.
SIGNATURE OF OWNER/REPRESENTATIVE
DATE</td></tr>
<tr><td>6</td><td>If you choose the Save 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.</td></tr>
</table>

Transferring a Tenant Between Units

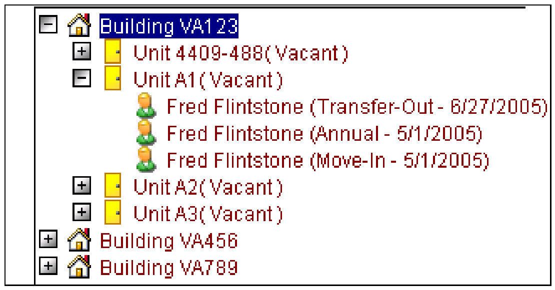
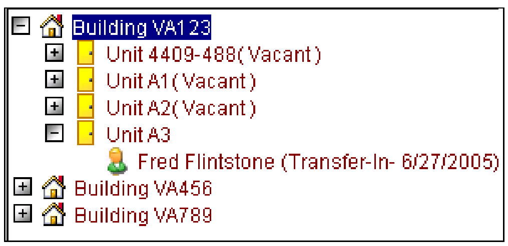
Procedure Complete these steps to transfer a tenant from one unit to another.

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 **Transfer** button.
4	The **Unit Transfer** screen displays. If necessary, change the **Effective Date**. 
5	The system will provide a list of vacant units within the property. Select the unit to which the tenant is moving from the **Vacant Units** dropdown list.
6	Click **Transfer** and then click **Close** to save your changes.

Continued on next page

Transferring a Tenant Between Units, Continued

Procedure (continued)

Step	Action
7	The certification will display under the now vacant unit in the **Tenant Compliance** tree as a “Transfer-Out” certification. 
8	The tenant certification “Transfer-In” will appear under the new unit. 

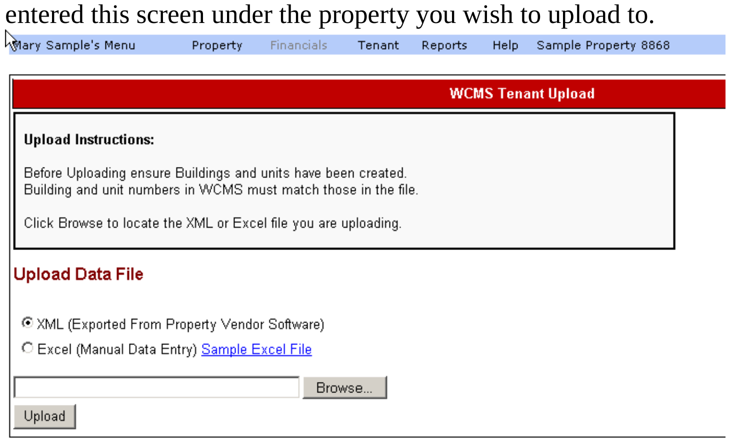
Uploading Tenant Data from a File

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.

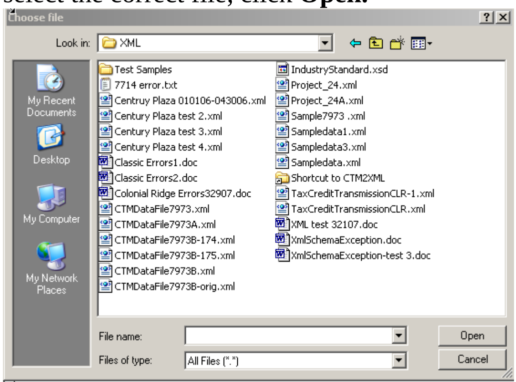
Step	Action
1	After selecting a property, from the top menu select **Tenant**, **Tenant Upload**.  **Note:** This feature will be grayed out if you don't have access to it. If you are trying this for the first time, contact VHDA for authorization at 804-343-5758.
2	The following **Tenant Upload** screen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

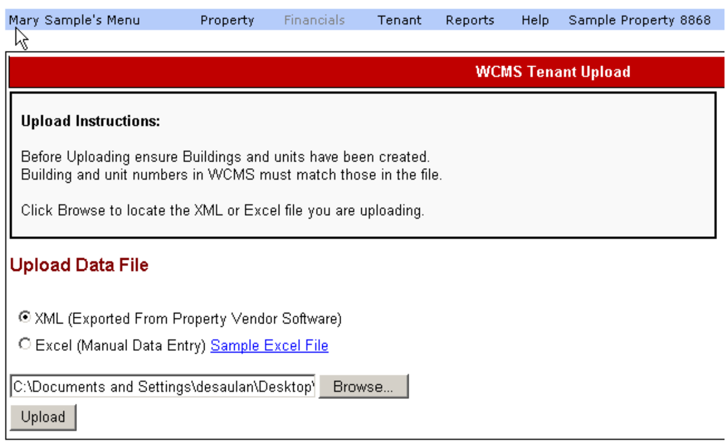
Continued on next page

Uploading Tenant Data from a File, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Click on Browse to find your file on your computer. Once you select the correct file, click Open.


</td></tr>
<tr><td>4</td><td>The file path will appear in the open field below. Click Upload to process file. Depending on the size of your file it may take some time.


</td></tr>
<tr><td>5</td><td>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.</td></tr>
<tr><td>6</td><td>Return to My Projects to refresh the data within WCMS and view as needed to ensure successful upload.</td></tr>
</table>

Notifying VHDA About New Tenant Data

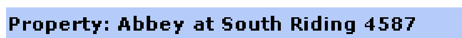
Overview

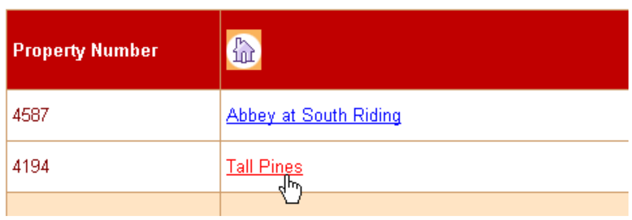
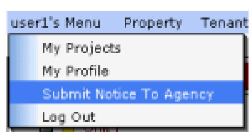
Optional – Not required by VHDA.

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.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Ensure that the property you have updated is selected. (The currently selected property is displayed on the right side of the menu bar.)


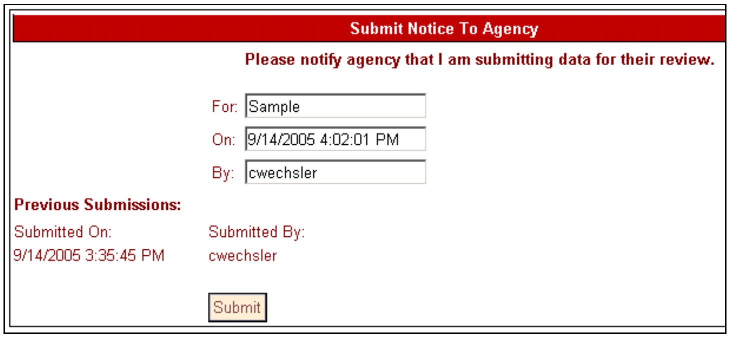
To select a different property, click on the user's menu and then select My Projects. Select the property from the list.

</td></tr>
<tr><td>2</td><td>Click user's Menu</td></tr>
<tr><td>3</td><td>Click Submit Notice to Agency on the user's menu.

</td></tr>
</table>

Continued on next page

Notifying VHDA About New Tenant Data, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>The Submit Notice to Agency screen appears. The For field lists the currently selected Property; the On field lists the current date and time; and the By field lists your user name. Information about any of your previous submissions is listed in the lower left-hand portion of the screen.



</td></tr>
<tr><td>5</td><td>Click Submit to notify VHDA that you have added tenant information.</td></tr>
</table>

Working with Reports

Overview

This section contains the following topics.

WCMS Reports

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

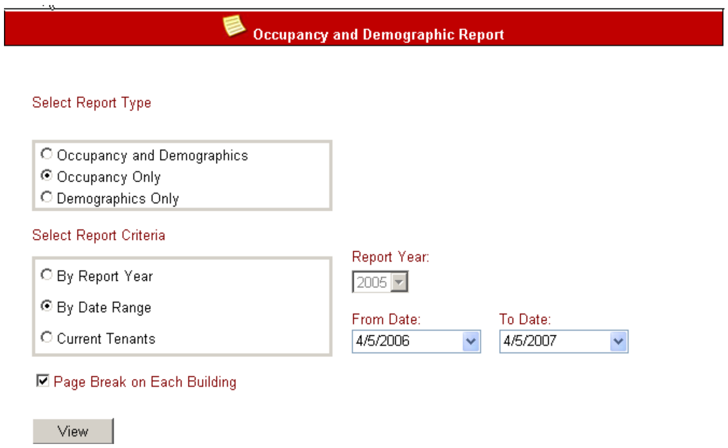
The Occupancy and Demography Report lists the following information for each unit in the project for the selected time period:

- 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.

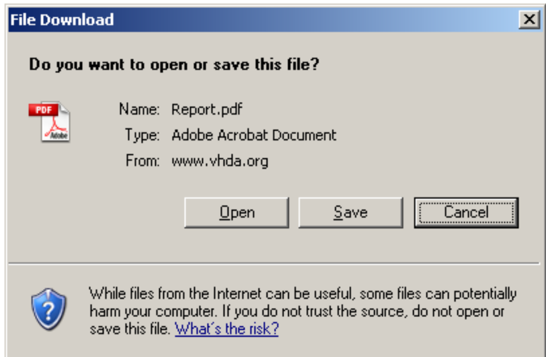
Step	Action
1	Click on a project in the **Assigned Projects** page. The **Project Information** screen appears.
2	Click **Occupancy Report** on the **Reports** menu.
3	The **Occupancy and Demographic Report** screen appears. 
4	Select the report type: **Occupancy**, **Demographics**, or **Both**.
5	Select a time period. • To view the information by year, select the **By Report Year** option and then choose the year from the dropdown list. This will include any tenants that have a certification during that year. • To view the information for a specific period of time, select the **By Date Range** and then select the date range from the dropdown lists. • Checking **Current Tenants** will give you the last activity for all Current Households. • Checking **Page Break on Each Building** will create a new page for each building in your property.

Continued on next page

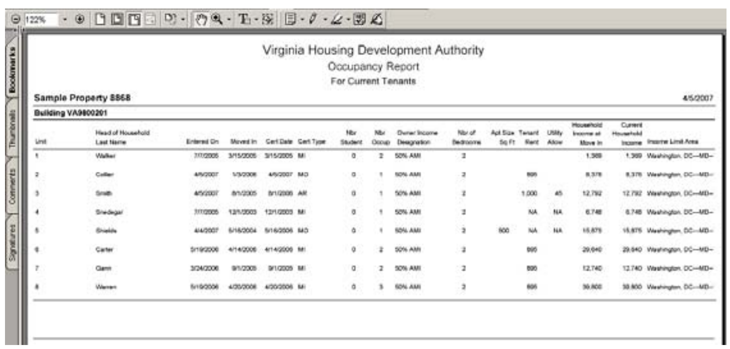
Creating, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Click the View button. Your computer may display the following message. Click Open to view the report or Save to save a copy of the report in a specified folder on your computer.



</td></tr>
<tr><td>7</td><td>Adobe Acrobat Reader will open and display the report. Following is a sample Occupancy Report:



</td></tr>
<tr><td>8</td><td>Use the toolbar to change the view options, navigate through the pages, or print the report. See the following sections for instructions.</td></tr>
</table>

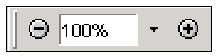
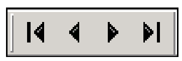
Viewing and Printing

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.

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 **Print** icon to display the **Print** dialog box where you can select print options and print the report. 

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.

Step	Action
1	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 www.vhda.com. You should call your assigned Compliance Officer if you need assistance locating a particular form.