ILLINOIS HOUSING DEVELOPMENT AUTHORITY

INFORMATION TECHNOLOGY DEVELOPMENT
AUTHORITY_ONLINE_TENANT_EVENT_GUIDE.DOC

The following guide provides a general overview of how to enter tenant events for a development's compliance year in Authority Online and details the various steps and sections needed to enter those events.

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Illinois Housing Development Authority

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0.0 OVERVIEW

The following guide provides a general overview of how to enter tenant events for a development's compliance year in Authority Online and details the various steps and sections needed to enter those events.

1.0 PREREQUISITES

To go through the following steps you must…

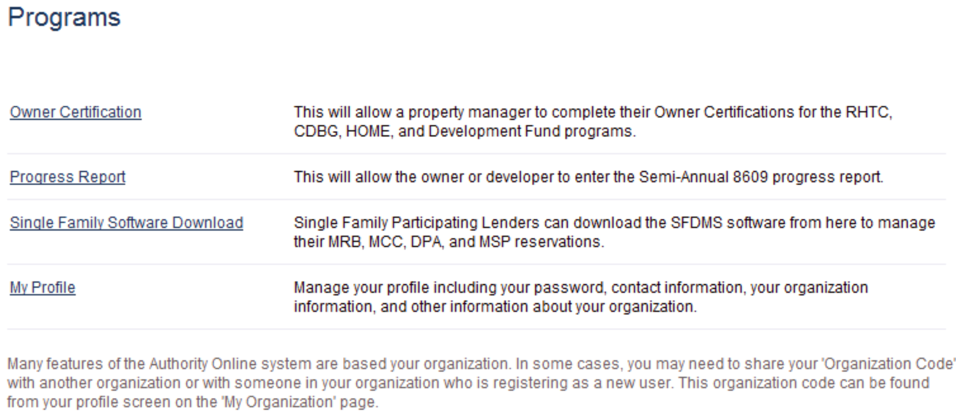
1. Have Internet access, we recommend using Internet Explorer for the best results
2. Have an account setup in Authority Online
3. Have the right permissions setup to enter the following information into Authority Online for the developments you're working with

2.0 NAVIGATION TO THE TENANT EVENTS AREA

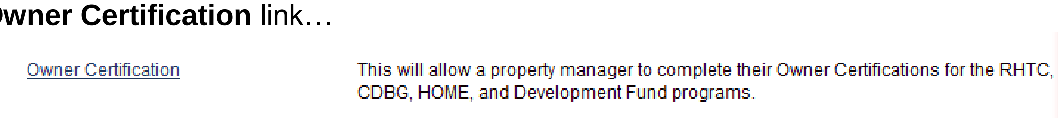
The following steps detail how to get to the Tenant Events editing area after logging in to Authority Online.

2.1 Owner Certification

After you login, you'll have a list of options you can go to in Authority Online on the Programs Screen.

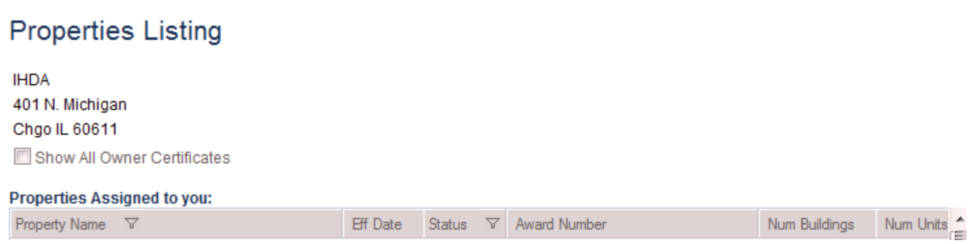


Click on the **Owner Certification** link…

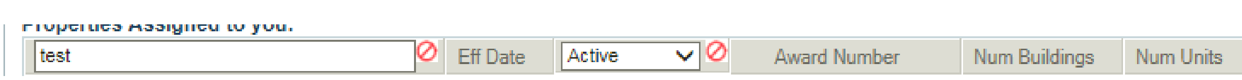


2.2 Property Search

You'll then see a list of projects that are accessible to you, notice that on top of that list is the filter bar, use it to narrow down the list…



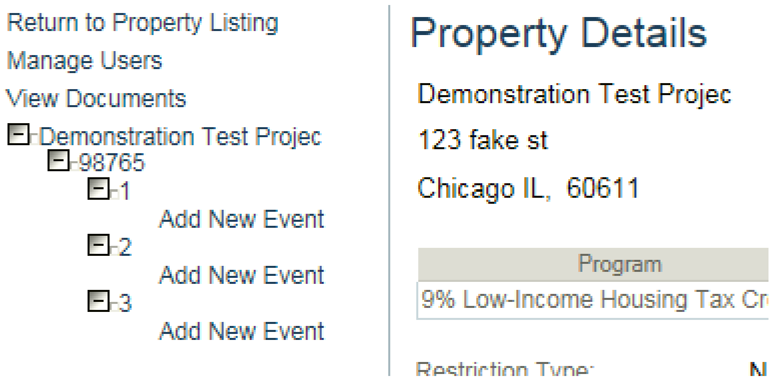
For example…



You may also want to display previous years on your list to do so check the box by "Show All Owner Certificates" towards the top of the screen…

After you narrowed down the list of properties click on the blue link for the property and Eff Date (Compliance Year) you want to work in..

Afterwards you'll be directed to the Prpoerty Details Screen, exampled as follow.

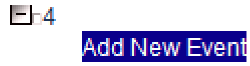


On the left side of the screen you'll see the Project Name, followed by building, and then units. If you click the plus signs for the units you'll see the option to "Add New Event" and any events that you've already created, for example…

You can edit events you already created as long as you haven't finalized for that year.

3.0 TENANT EVENTS

To create a tenant event in Authority Online first find the corresponding unit for that event and click on the blue highlighted "Add New Event"…

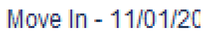


Note: In the previous example the unit is new so there are no previous events and only a new event can be added.

3.1 Events

The following is a listing and some visual examples of events, if the compliance year is Active for these events than you can still edit…

1. Recertify 

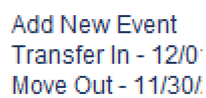
2. Move In 

3. Move Out 

4. Transfer Out 

5. Transfer In 

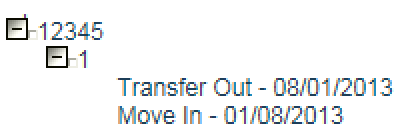
(Created after a Transfer Out is saved)
6. Rent Update, which changes Rent information
7. Composition Update, which changes Tenant Information
8. Student Update, which changes student information for the event
9. You can also have multiple events for a unit…



Transfer Event Note: When you select a Transfer Out event you'll be prompted to select a building and unit to move the tenant to. That unit has to be vacant, so before you do a Transfer Out event ensure that the unit being transferred to is available. Also, when you do a Transfer Out it will automatically create a Transfer In event for the unit you're moving that tenant to. The "Transfer In" event will still need you to input information, such as Utility Allowance and rent, so don't forget to fill that information in.

3.2 Edit Existing Events

You can edit existing events by simply clicking on the blue link for the event on the left side of the screen, for example after you click the plus signs and reveal the events for a unit…



The Event Details screen will then prompt.

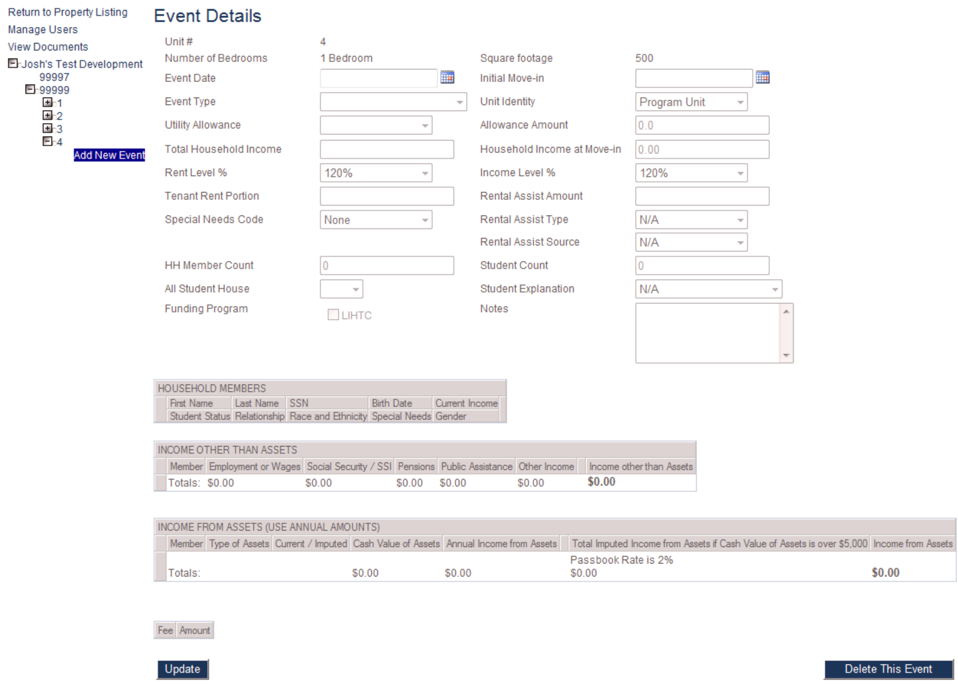
Caution: Not all fields are open to editing with the options listed above. In some cases you won't be able to go back and edit an event that was already placed in with a Rent Update, Composition, or Student Update and may have to delete the event and reenter.

3.3 Add New Event

For the following sections we'll use the Add New Event as an example as it shows all of the fields for the Event.

3.4 Event Details Screen

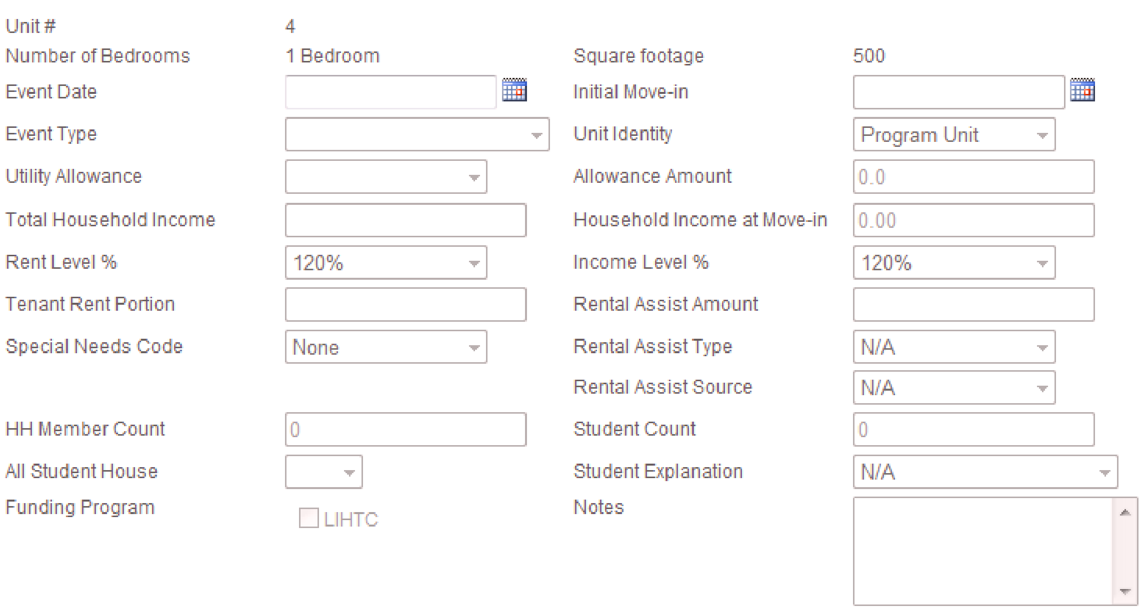
After you click on the Add New Event option you see the Event Details Screen…



The screen will either be populated with the last event that was inputted, which could be from the previous year or will be blank if it's a new unit to Authority Online.

3.4.1 Event Information

The fields in the top portion of the Event Details Screen are the specific to the event itself…



Step 1: Start by entering the Event Date…

Note: Ensure that you have entered dashes between the month, day, and year

Then click on the Enter Key on your keyboard..

Step 2: Next Enter the Event Type, which are…

1. Move In
2. Move Out
3. Recertify
4. Transfer Out
5. Composition Update
6. Rent Update
7. Student Update

Caution: Once you select an event type it greys out immediately. If you choose the wrong event you have to delete the event and start over.

For example is someone is moving into a unit on this date then select the Move In event …

After you have entered the date and the event type you can now enter the remaining information for the tenant event. Many of the fields will be required for entry in order to save the event.

3.4.1.1 Required Fields

Now all of the other fields on the Event Details Screen. Apply the appropriate information to the following necessary fields…

1. Initial Move-in, which will be automatically populated since this is a Move in Event
2. Utility Allowance, select from the utility allowances you created earlier
3. Allowance Amount, will automatically be populated from the Utility Allowance you selected
4. Total Household Income – The income of the household at the time of the event being entered.
5. Household Income at Move-in, this should be the same as Total Household Income at Move In, don't change it to the recent income level.
6. Rent Level %
7. Income Level %
8. Tenant Rent Portion
9. Rental Assist Amount, which is 0 if there is no additional rental assistance source for the tenant event
10. HH Member Count, there must be at least one and is based on how many tenants live at this unit.
11. Funding Program, for compliance monitoring there has to be a funding program, in this case there's only LIHTC to check. Non program units don't need the funding program to be checked.

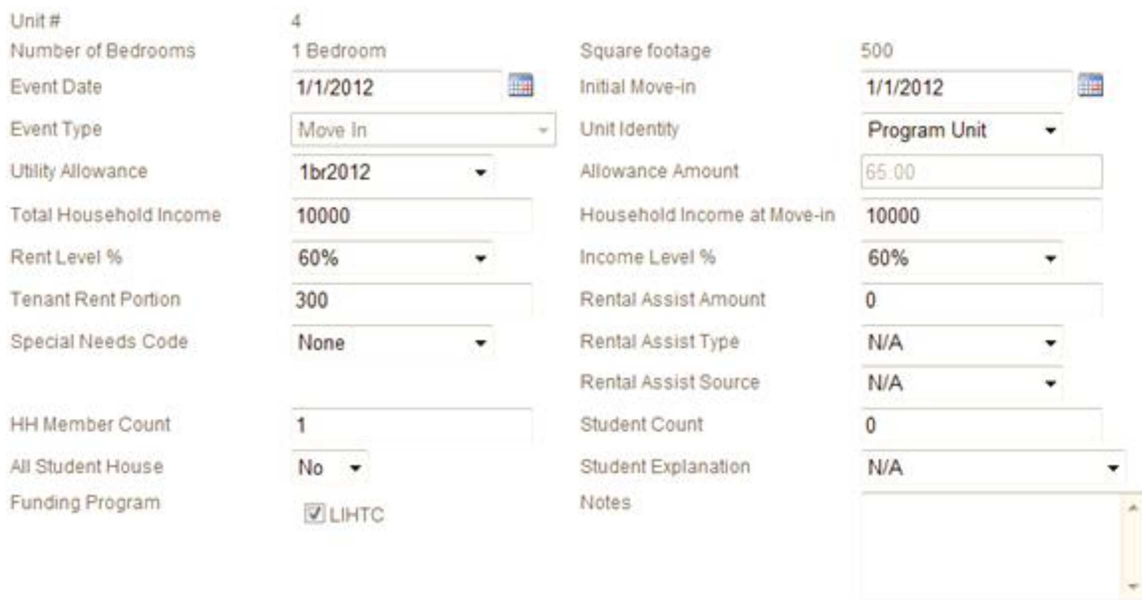
3.4.1.2 Other Fields

The following fields are additional fields that can be filled in…

1. Special Needs Code
2. Rental Assit Type
3. Rental Assist Source
4. Student Count
5. All Student House
6. Student Explanation
7. Notes

3.4.1.3 Event Information Example

The following is an example of unit filled with the minimum fields required…



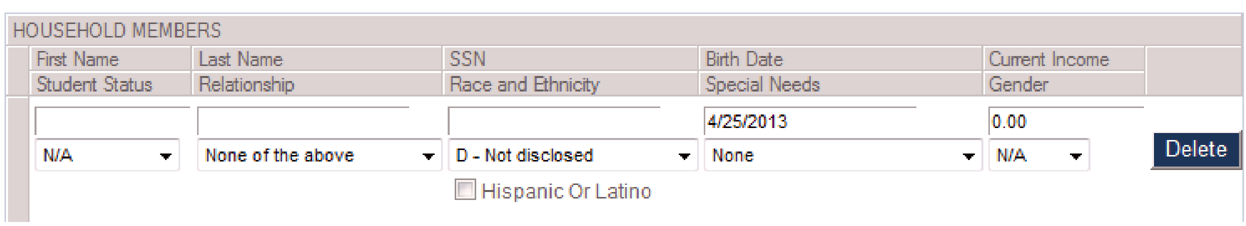
Unit #	4		
Number of Bedrooms	1 Bedroom	Square footage	500
Event Date	1/1/2012	Initial Move-in	1/1/2012
Event Type	Move In	Unit Identity	Program Unit
Utility Allowance	1br2012	Allowance Amount	65.00
Total Household Income	10000	Household Income at Move-in	10000
Rent Level %	60%	Income Level %	60%
Tenant Rent Portion	300	Rental Assist Amount	0
Special Needs Code	None	Rental Assist Type	N/A
		Rental Assist Source	N/A
HH Member Count	1	Student Count	0
All Student House	No	Student Explanation	N/A
Funding Program	☑ LIHTC	Notes	

3.4.2 Tenant Information

The lower half of the Event Details Screen details the Tenant's information

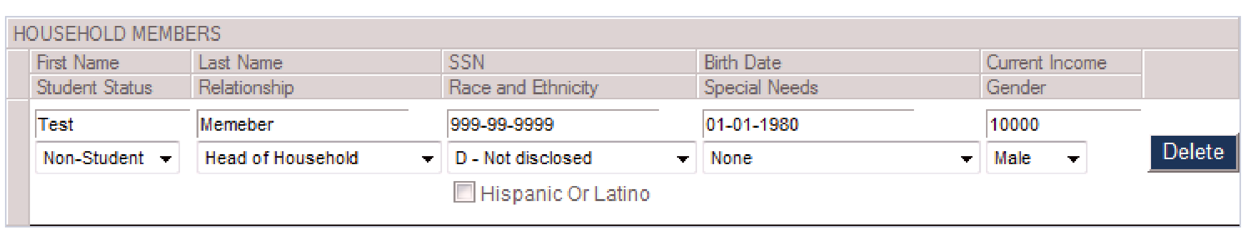
The first part is the household member information. To add a new household member click on the Add Member button…

This will display the Household Members table…



3.4.2.1 Required Fields

You will need to fill in the Fist Name, Last Name, SSN (Social Secruity Number), Birth date, Current Income, Student Status, Relationship, Race and Ethnicity, and Gender. All of the fields except Special Needs, which you may add if you have information for…



Other Minimum Requirements…

1. There has to be one Head of Household for the unit in the Relationship field
2. All of the incomes listed for all houehold members must equal the Total Household Income field in the upper half of the screen.

3.4.2.2 Other Sections

You can also add in Non-Asset Income and Asset Income for the household as well …

Add Non-Asset Income

INCOME OTHER THAN ASSETS						
Member	Employment or Wages	Social Security / SSI	Pensions	Public Assistance	Other Income	Income other than Assets
Totals:	$0.00	$0.00	$0.00	$0.00	$0.00	**$0.00**

Add Asset Income

INCOME FROM ASSETS (USE ANNUAL AMOUNTS)						
Member	Type of Assets	Current / Imputed	Cash Value of Assets	Annual Income from Assets	Total Imputed Income from Assets if Cash Value of Assets is over $5,000	Income from Assets
Totals:			$0.00	$0.00	Passbook Rate is 2% $0.00	**$0.00**

3.4.3 Non-Asset income

To input new non-asset income click on the Add Non-Asset Income button…

Add Non-Asset Income

Then select the household member it applies to and the amount for each column type, for example employment wages…

INCOME OTHER THAN ASSETS							
Member	Employment or Wages	Social Security / SSI	Pensions	Public Assistance	Other Income		Income other than Assets
Test Three	8000.00	0.00	0.00	0.00	0.00	Delete	
Totals:	$8000.00	$0.00	$0.00	$0.00	$0.00		**$8000.00**

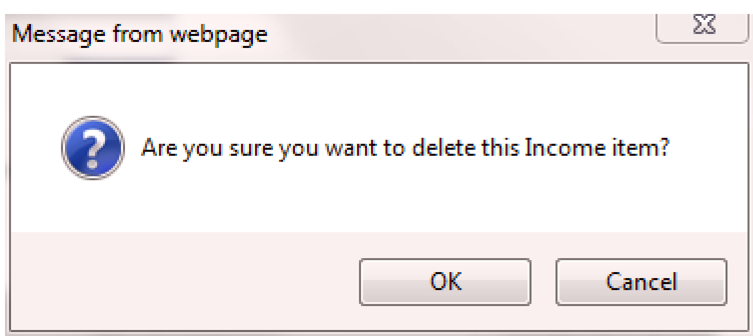
Note: Non-Asset and Asset Income must equal the amount of income entered for each member and all non-asset and asset income must equal the Total Household Income for the unit.

To remove a row of non-asset income information click on the corresponding Delete button in that row…

Delete

Caution: deletes are permanent

You will then get a prompt asking if you're sure you want to delete the non-asset income, click on OK to remove the line item…



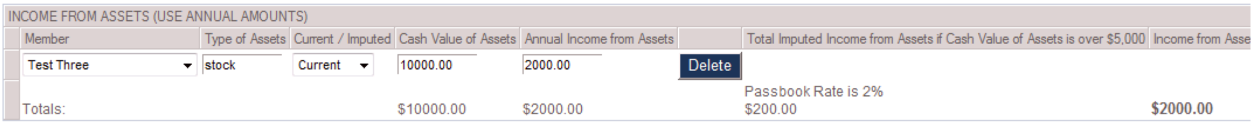
The non-asset income line item has now been removed…

INCOME OTHER THAN ASSETS						
Member	Employment or Wages	Social Security / SSI	Pensions	Public Assistance	Other Income	Income other than Assets
Totals:	$0.00	$0.00	$0.00	$0.00	$0.00	**$0.00**

3.4.4 Add Asset Income

To input new asset income click on the Add Asset Income button…

Then select the household member it apples, type in the type of asset it is, select whether the asset is current or imputed, the value of the asset, and the annual income from the asset…

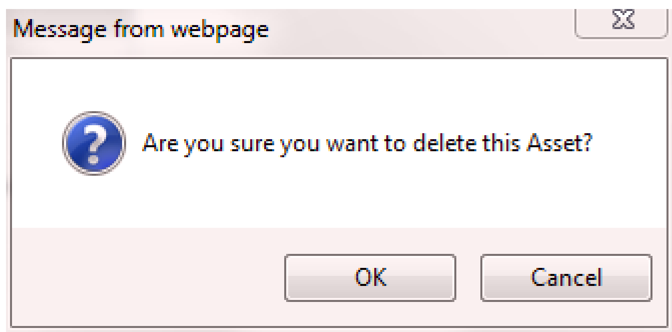


Note: Non-Asset and Asset Income must equal the amount of income entered for each member and all non-asset and asset income must equal the Total Household Income for the unit.

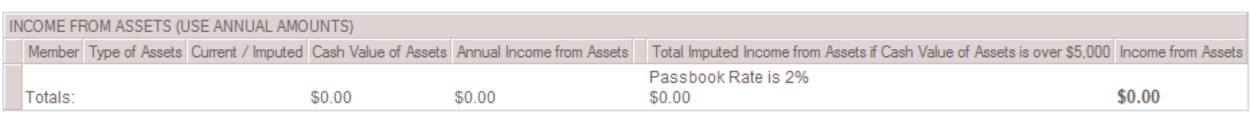
To remove a row of asset income information click on the corresponding Delete button in that row…

Caution: deletes are permanent

You will then get a prompt asking if you're sure you want to delete the asset income, click on OK to remove the line item…



The asset income line item has now been removed…



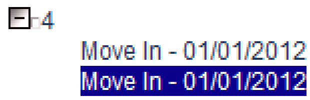
3.5 Update

When you're done inputting the information for the tenant event click on the Update button to save the information…

You'll also see a new Tenant Event listed by the unit…

3.6 Deletion

If you need to delete event there is a button that enables you to do so, an example might be if you entered in an event twice…

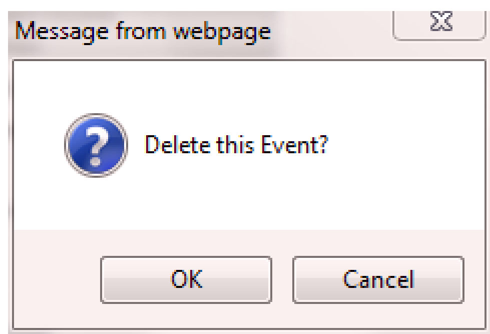


Caution: A Delete is permanent and not recoverable.

Best Practice: If you are going to delete an event, especially is you're going to reapply most of the information for that event take screenshots so that you ensure that you don't miss any information.

So click on the event you wish to remove and click on the Delete This Event button, which if found in the lower right of the Event Details Screen…

You will then get the following warning prompt…



If you want to continue with the delete process click on OK to remove the event. The event will then be removed…