HOUSING AUTHORITY of BALTIMORE CITY

HCV Owner Portal

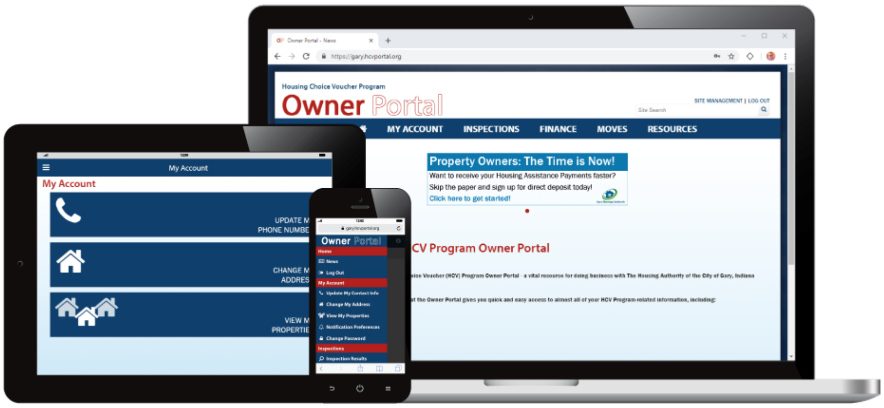
User Guide

CVR

Contents

Introduction

This Owner Portal User Guide walks through key functions of the Portal, such as tracking moves, viewing abatements, and changing notification settings. Contact OwnerServices@habc.org if there are question about the manual or any site functions.



Register for an Account

The Owner Portal ties information together based on e-mail address on file. This way, owners with more than one tax ID in the program can access all of their information under one unified log-in, or **umbrella log-in**.

To register for an account, click Sign Up near the bottom of the page. Provide the e-mail address on file, at least one of tax ID for validation purposes, and a password.

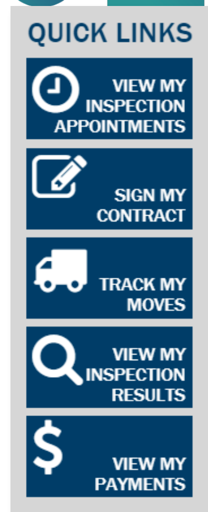
Click Register. The system generates an e-mail at the provided address. Click the link to activate the account, and log-in to the account in the pop-up window.

Change Password

To change an account's password, click **Forgot Password?** on the home page. Follow the on-screen directions and log-in with the temporary password provided. Once logged in, click **Account Settings** in the top-right corner of the page and then select **Password Reset** to change the password.

Site Basics

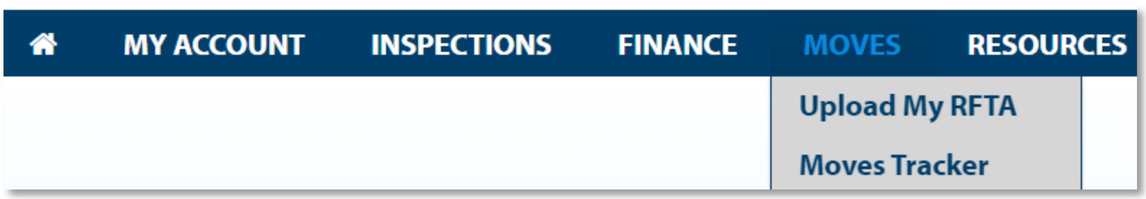
Quick Links



Quick Links are located to the left-hand side of every page on the Owner Portal. These are the most useful links to owners: View My Inspection Appointments, Sign My Contract, Track My Moves, View My Inspection Results, and View My Payments.

Site Menu

At the top of the Owner Portal is the main site menu. Click the links in the menu to visit the corresponding section. Click to return to the home page. Hover over a menu link to reveal any subsections and resources related to that link.



Site Settings, Social, and Search

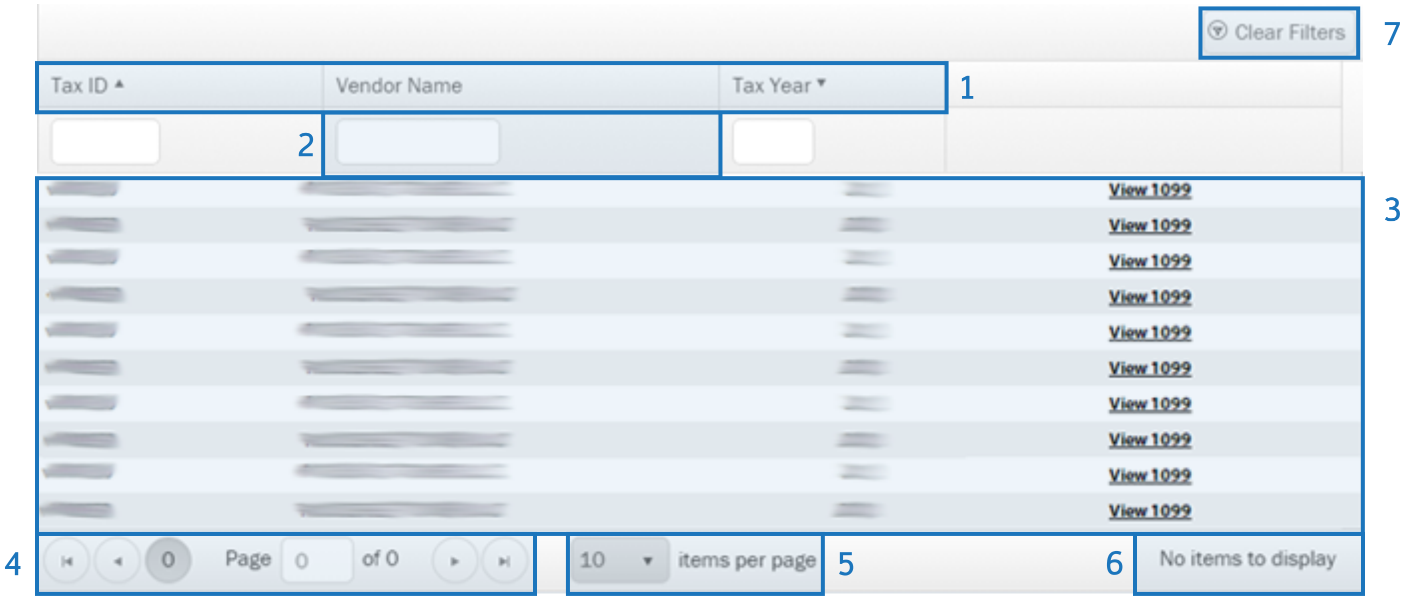
Links to a PHA's social media pages, the Account Settings icon, and the Log Out options are located in the top-right corner of the Owner Portal. Click on Account Settings to change an account's password or notification preferences.

Please remember to log-out of the Owner Portal after accessing information, as the site contains sensitive information such as HAP Statements and 1099s.

The Owner Portal also features a search bar, which is located beneath the Account Settings icon. Fill in the field and press Enter or Return on the keyboard to search the Owner Portal.

Grids

Information in the Owner Portal is organized in a grid layout. The grids have similar functionality across the Portal, making it easier to navigate and access information:



1. **Column Headers**: Sort by ascending or descending values by clicking ▲ or ▼.
2. **Search Field**: Search a column by entering information, like a specific vendor name, to show only row entries containing that information.
3. **Records Area**: Review data on file within this section. The table loads blank if no data is available. Some row grids are clickable and subsequently reveal data associated with the grid. Click on links within a column to download information (for example, clicking **View 1099** in the above grid prompts a download of the 1099 statement).
4. **Navigation Icons**: Click the page number or arrow icons to navigate a grid with more than one page. Select the leftmost and rightmost arrows navigate to the first and last pages, respectively.
5. **Items per Page Field**: View the number of pages and entries for this grid. Select the dropdown to define the number of entries shown per page.
6. **Items Displayed**: View the total number of records.
7. **Clear Filters**: Click this icon to remove any set filters to a grid.

My Account

Update My Phone Number

To update a phone number for any tax ID, hover over **My Account** in the blue navigation menu and click **Update My Phone Number** or the **Update My Phone Number** tile on the **My Account** page.

Click Edit in the leftmost area of the applicable row. Replace existing phone numbers or provide phone numbers where none exist. Once updated, click Update. A green confirmation message will display if the request is successfully transmitted. Please allow 1-2 business days for the information to be updated in the Owner Portal.

Change My Address

To update the mailing address any of tax ID, hover over **My Account** in the blue navigation menu and click **Change My Address** or click the **Change My Address** tile on the **My Account** page.

Click Edit in the leftmost area of the applicable row. Enter the new address and the date when the address change will become effective. Click Update. A green confirmation message will display if the request is successfully transmitted. Please allow 1-2 business days for the information to be updated. An automated e-mail with the receipt will be sent once the request is processed.

View My Properties

To see properties within the HCV program, hover over **My Account** in the blue navigation menu and click **View My Properties** or click the **View My Properties** tile on the **My Account** page. A grid displays listing an owner's HCV properties along with helpful information such as the tenant name, contract rent, and HAP amount for each property.

Vendor #	Client #	Tenant Name	Unit ID	Address	Voucher S
V02	093	Giordan	1	8 Bantor	2
V02	096	Kelly An	1	1829 D	2

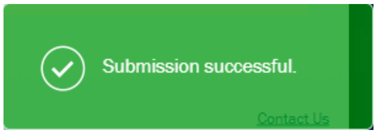
Notification Settings

The Owner Portal notifies owners of changes to in-progress moves and rent increase requests. These changes are sent weekly to the e-mail address linked to the account. Owners can be automatically notified of any news entries added to the Owner Portal.

To change these settings, click **Account Settings** in the top-right corner then **Notification Preferences** or hover over **My Account** and click on **Notification Preferences**.

For these alerts, select or deselect the checkboxes to be alerted by e-mail, if desired. Then click Submit.

A green confirmation message displays in the bottom right corner of the screen if the request was correctly processed. If it does not display, contact OwnerServices@habc.org.



Message Center

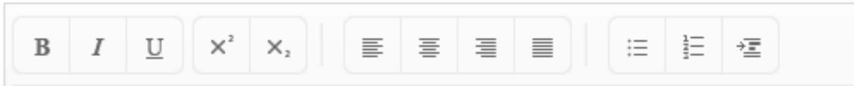
In the Message Center, view messages sent to the owner by the PHA, including requests for more documentation or notifications of rent increases or decreases. Owners can respond to any messages within the Center and attach documents, if applicable.

Access this page by hovering over **My Account** and clicking **Message Center**.

Add a Reply

To see more information about and respond to a message, complete the following steps:

1. Click ▸ next to a specific message's subject.
2. Select [Add new reply] beneath the subject line. A **Reply** pop-up box appears.
3. Respond using the **Message** field, using the toolbar to customize the content.

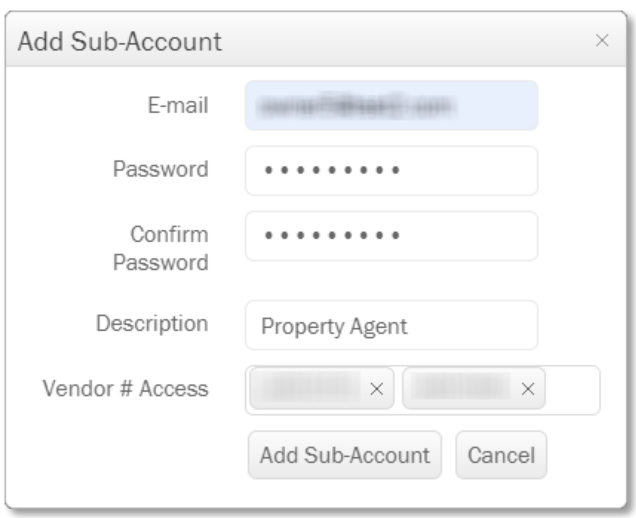


4. Attach files to the message by clicking [Select files...].
5. Select [Add Reply] to send the message.

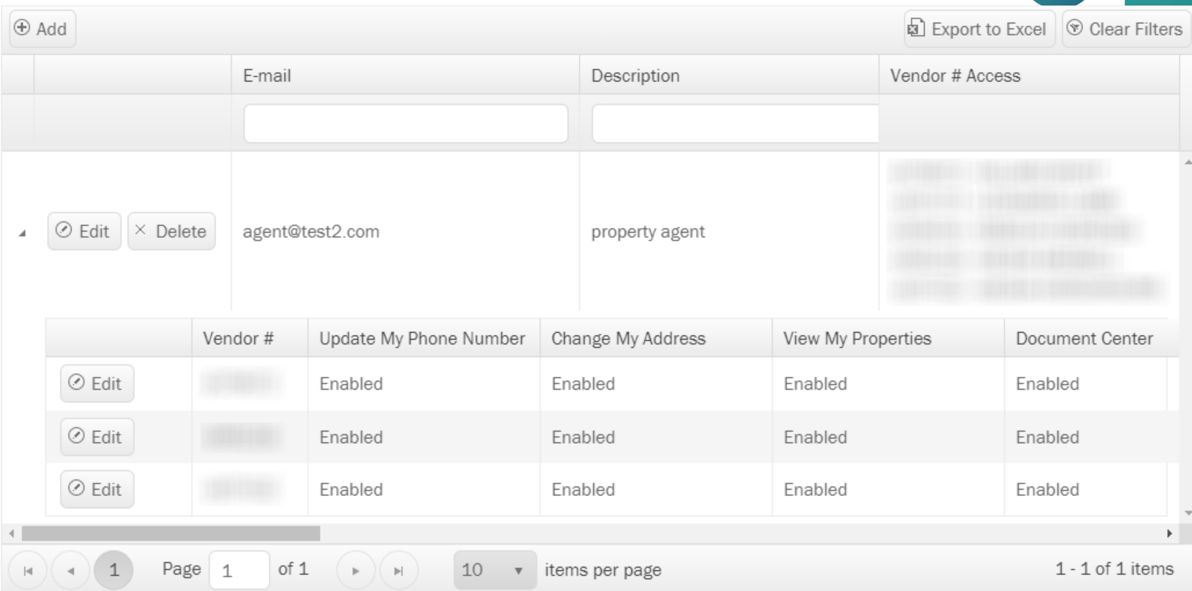
Sub-Accounts

Access this section by hovering over **My Account** and then selecting **Sub-Accounts** within the dropdown menu. This section provides owners the option to grant property managers or other staff access to the Portal, eliminating the need to disseminate an owner's own username and password. Additionally, owners can define what sections of the Portal are accessible to each sub-account based on vendor numbers.

To create a new sub-account, click [Add]. Fill in the fields and click [Add Sub-Account].



Click ▸ to see more information about each sub-account.



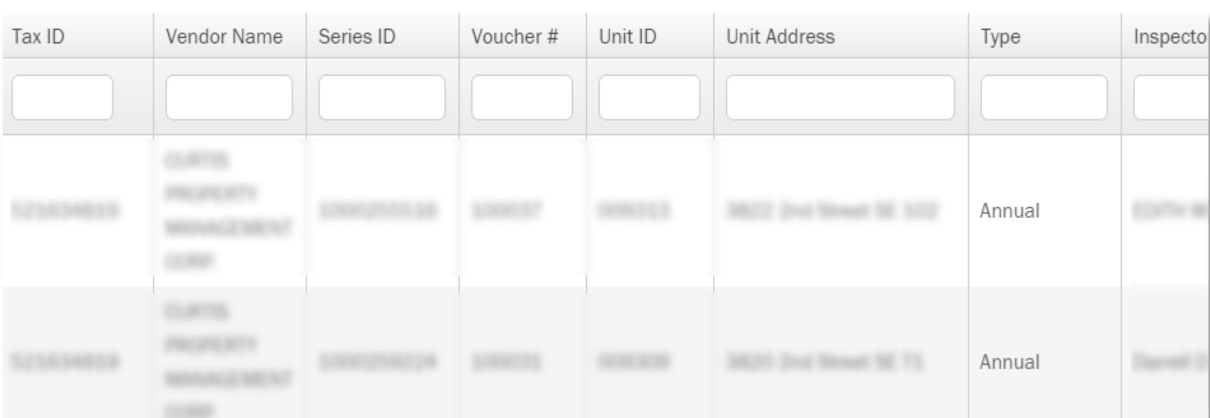
Inspections

View Inspections Appointments

To view inspection appointments, hover over **Inspections** in the blue navigation menu and click **Inspection Appointments** or click the **View My Inspection Appointments** tile on the **Inspections** page.

A grid displays that contains information related to upcoming inspections, such as the inspection ID, voucher number, unit address, and inspection date.

NOTE: Time frames are not available until two (2) business days prior to the inspection date.



View Inspection Results

To view inspection results, hover over **Inspections** in the blue navigation menu and click **Inspection Results** or click the **View My Inspection Results** tile on the **Inspections** page.

A grid displays showing all inspections results and contains a list of all inspections series that have taken place. Click an inspection series to see more information.

Series ID	Vendor #	Tenant Name	Unit ID	Unit Address	Original Type	Last Inspected	Last Result
3	V02	Santo	20	1825 Avenue, 2	Initial - Regular	11/19/2020	Approved
3968	V24	Marie Medley	201	54 2L	Rent Evaluation	11/18/2020	Rent Evaluation Completed

Three additional tables display when an inspection is selected:

- **Inspection Series Info:** Provides information on the unit, landlord, and tenant involved with that inspection.
- **Inspection Appointments:** Lists all the inspection appointments associated with that series.
- **Fail Items:** Lists all deficiencies found during inspections.

Inspection Series Info

Tenant Name Santo
Unit Address 182
Vendor Name

Inspection Appointments

Export to Excel | Clear Filters

Inspection Date	Type	Inspector Name	Result
11/19/2020	Initial - Regular	Nathan	Approved
11/17/2020	Initial - Regular	Nathan	1st Rejection

Fail Items

Export to Excel | Clear Filters

Fail Date	Room	Area	Responsibility	Fail Item	Emergency
11/17/2020	Kitchen - First Floor - Front - Center	Electrical Hazards	Owner	Repair/Replace defective GFCI outlet near stove	No
11/17/2020	Kitchen - First Floor - Front - Center	Refrigerator	Owner	Install all shelving and support bars property	No

To see information about other inspections, click on a different inspection in the **Inspection Series** table. Use the search boxes located at the top of each column to search by Tax ID, Unit ID, Series ID, or Tenant Name.

Finance

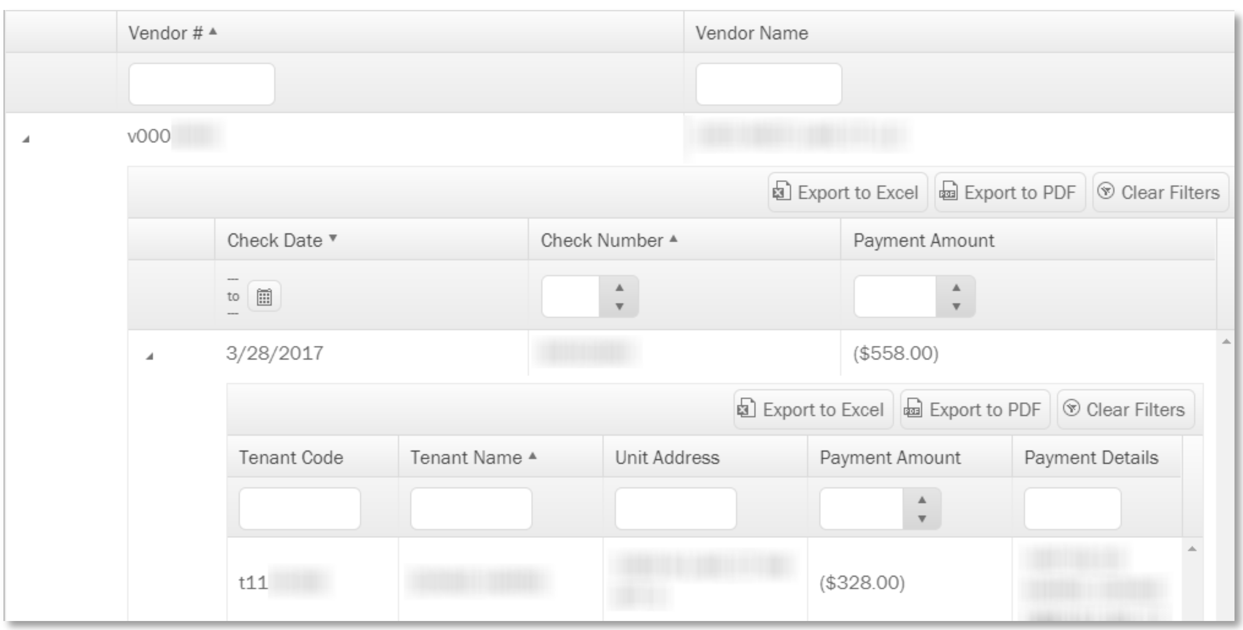
View HAP Statements

To view HAP statements, hover over **Finance** in the blue navigation menu and click **View My HAP Statements** or click the **View My HAP Statements** tile on the **Finance** page.

On this page, click ▸ to view a list of HAP statements related to a vendor or tenant.

Click ▸ again next to a specific payment to view detailed information (tenant names, unit addresses, and payment amounts).

To download HAP statements, click Export to Excel or Export to PDF.



View Abatements

To view abatements, hover over **Finance** in the blue navigation menu and click **View My Abatements** or click the **View My Abatements** tile on the **Finance** page. A grid loads showing abatement data.

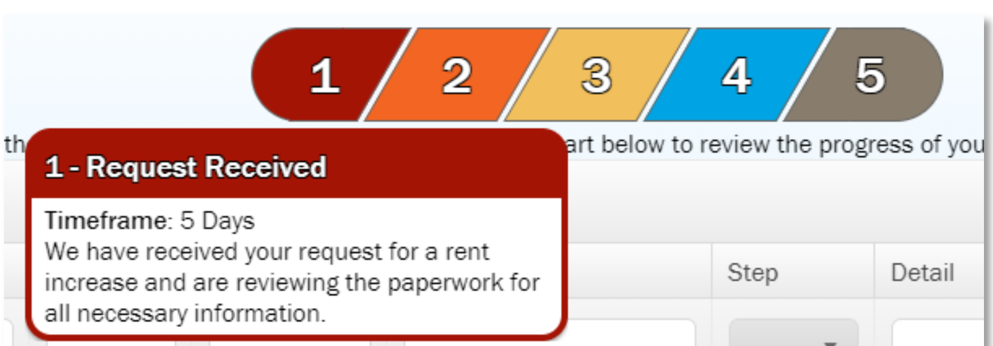
View 1099 Statements

To view 1099 statements, hover over **Finance** in the blue navigation menu and click **View My 1099.** View a 1099 by clicking **View 1099** in the record's row.

Track a Rent Increase Request

To track a rent increase, hover over **Finance** in the blue navigation menu and click **Rent Increase Tracker** or click the **Track a Rent Increase** tile on the **Finance** page.

The tracker displays at the top of the page, which summarizes the rent increase request process. Hover over the tracker for more detailed information about the process, as well as the timeframe of completion for individual steps.

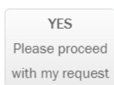


Below the tracker, the grid contains rent increase requests and the status of each request. Click the dropdown under the **Step** column to filter by a specific step in the process. The **X** indicates the request was denied or cancelled.

Request a Rent Increase

The Owner Portal allows owners to make rent increase requests directly through the site through the use of electronic signatures. To make a rent increase request, hover over **Finance** in the blue navigation menu and click **Request a Rent Increase** or click the **Request a Rent Increase** tile on the **Finance** page.

Carefully read the language before requesting a rent increase. Please note that a rent increase request may potentially result in a rent decrease**.**

Click the 

button at the bottom of the page to confirm that the content has been read and understood. Complete the form in its entirety and submit.

Direct Deposit Authorization

Request to change direct deposit information using the Owner Portal by hovering over **Finance** in the blue navigation menu and clicking **Change Direct Deposit Info**.

NOTE: Direct deposit change requests can only be submitted for one tax ID at a time. Provide the requested information for the account where the funds will be deposited.

1. Select a vendor within the **Select a Vendor** drop down.
2. Provide details of the account where the HAP will be deposited within the **Name of Financial Institution**, **Account Number**, and **Routing/Transit Number** fields.
3. Select next to either **Checking** or **Saving**.

4. Upload a voided check or letter from the financial institution using Select files... .

5. Provide information for the payee* by completing the fields under the **Payee Information** header, including **SSN** or **Federal Tax ID #.**

6. Read through the disclaimer and click ☐ (if in agreement with the statement).

7. Click Submit to submit the request.

**The payee is the direct deposit account owner and whose name appears on the voided check. Be sure to fully read through the instructions and understand the terms and conditions prior to submitting the form.*

Moves

Upload an RTA

To upload an RTA to the Owner Portal, hover over **Moves** in the blue navigation menu and click **Upload My RTA** or click the **Upload My RTA** tile on the **Moves** page.

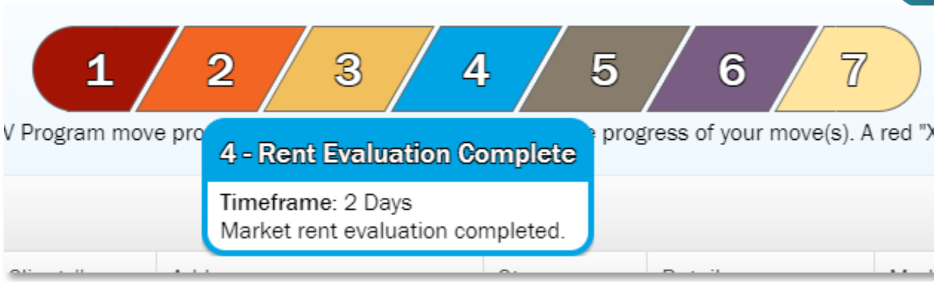
This page prompts owners to provide information about the voucher number and unit listed on the RTA. After all fields are filled in, click Select files... to upload attachments.

If transmitted successfully, a confirmation message displays. Please allow a few days for processing; owners will be contacted if additional documentation is required.

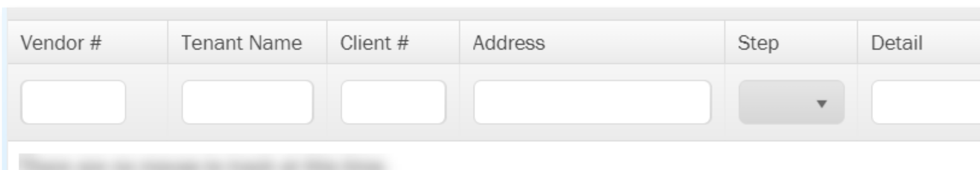
Track a Move

To track a move, hover over **Moves** in the blue navigation menu and click **Moves Tracker** or click the **Track My Moves** tile on the **Moves** page.

A tracker displays at the top of the page, which summarizes the move process. Hover over the tracker to view more detailed information about the process, as well as the timeframe of completion for individual steps.



The grid below the tracker contains outstanding moves and the status of those moves. Click the dropdown under the **Step** column to filter by a specific step in the process. The **X** indicates the move was denied or cancelled.



Sign a Contract

When a contract is ready to be signed, an e-mail is generated with a link to the HAP Contract signing page. This page can also be accessed through the Owner Portal by hovering over **Moves** in the blue navigation menu and clicking **Sign My Contract**.

Owners can always view contracts on this page and track their progress. Before signing a contract, it is important to first upload the lease by clicking the **Attach Lease.** Without the lease, the contract will not be processed.

After submitting the lease, the HAP Contract signing page loads; click on the **Sign Contract** link. This launches an Adobe Sign session. Carefully read and verify all information in the contract and sign the document. The contract will then be sent to the PHA to be signed. Once it has been approved and signed, an e-mail verification will be sent with the final copy of the contract.

Affordability Calculator

The **Affordability Calculator** utilizes information provided on a prospective tenant's RTA packet to determine if the unit is affordable for the family, permitting the owner to determine affordability before completing the RTA process.

1. Enter income and rent details in the **Annual Gross Income**, **Adjusted Gross Income**, and **Owners Requested Rent** fields.

2. Use the dropdowns for **City**, **Voucher Size**, **Unit Bedroom Size**, and **Unit Type** to fill in information about the unit.

3. Check the boxes to determine which utilities the family is responsible for paying.

4. Click Submit.

The Portal will calculate whether the unit is affordable and display one of the following messages: **Rent is not affordable** or **Rent is affordable**.