



HCV Owner Portal

User Guide



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Introduction

This Owner Portal User Guide walks through key functions of the Portal, such as tracking moves, viewing abatements, and changing notification settings. Contact **hcvp.info@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 popup 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: Inspection Appointments, Moves Tracker, Inspection Results, and View My Payments.



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

| MY ACCOUNT | INSPECTIONS | FINANCE | MOVES | RESOUR | CES |
|------------|-------------|---------|----------------|--------|-----|
| | | | Upload My RFTA | | |
| | | | Moves Tra | cker | |

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:

| | | | | | | 7 |
|----------|---|-----------|--------------|---|-----------------------|----|
| Tax ID * | Vendor Name | | Tax Year * | 1 | | |
| | 2 | | | | | |
| | de la constanción de | | 200 | | View 1099 | ٦. |
| | The second se | | | | View 1099 | 1 |
| | | | | | View 1099 | |
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| | | | - | | View 1099 | |
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| | | | 200 | | View 1099 | |
| | - | | _ | | View 1099 | |
| Page (| 0 of 0 | 10 v item | s per page 5 | | 6 No items to display | |

- 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 lcons: 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 ^{O Edit} in the leftmost area of the applicable row. Replace existing phone numbers or provide phone numbers where none exist. Once updated, click ^{O 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 Click

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 |
|------------|----------|-------------|---------|----------|---------------------------------------|
| | | | | | A A A A A A A A A A A A A A A A A A A |
| V02 | 093(| Giordan | 1 | 8 Bantor | 2 |
| V02 | 096 | Kelly An | 1 | 1829 Dr | 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 <u>hcvp.info@hcbc.org</u>.



Message Center

In the Message Center, view messages sent to the owner by the HABC, 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 I 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 | | | | | | | | | | |

| Add Sub-Account | | × |
|---------------------|------------------------|---|
| E-mail | mana (1994) and 1994 | |
| Password | • • • • • • • • • | |
| Confirm Password | •••• | |
| Description | Property Agent | |
| Vendor # Access | × × | |
| | Add Sub-Account Cancel | |

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



| ⊕ A | Add | | | | | | Export to | Excel S Clear Filters |
|-----|---------------------------------|-----------|------------------------|----------------|-----------------------------|---------|---------------|-----------------------|
| | | E-mail | | | Description | | Vendor # Acce | SS |
| | | | | | | | | |
| 4 | ⊘ Edit × Delete agent@test2.com | | | property agent | | | | |
| | | Vendor # | Update My Phone Number | Cha | nange My Address View My Pr | | perties | Document Center |
| | ⊘ Edit | | Enabled | Ena | abled | Enabled | | Enabled |
| | ⊘ Edit | | Enabled | Ena | abled | Enabled | | Enabled |
| | ⊘ Edit | | Enabled | Ena | abled | Enabled | | Enabled |
| • | | | | | | | | × |
| | | ge 1 of 1 | L (▶)(₩) 10 ▼ | item | ns per page | | | 1 - 1 of 1 items |

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.

| Tax ID | Vendor Name | Series ID | Voucher # | Unit ID | Unit Address | Туре | Inspecto |
|-----------|---|------------|-----------|---------|-----------------------|--------|----------|
| | | | | | | | |
| | CLATES PROPERTY REPUBLICATION COMP | | | | | Annual | 11111 |
| 121034818 | CLATES PROPERTY REPARCEMENT COMP | 1000200224 | 100001 | | 2820-2nd Street 55.73 | Annual | lared (|





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 4 | Last Result |
|-----------|----------|-----------------|---------|-------------------|-------------------|------------------|------------------------------|
| | | | | | | to | |
| 3 | V02 | Santc | 201 | 1825 Avenue, 2 | Initial - Regular | 11/19/2020 | Approved |
| 3968 | V24 | Marie Medle, | 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 | | | | | | | | | | |
| | | | | | | | Expor | t to Excel | Y Clear Filters | |
| Inspection Date + Type | | | | | Inspector Name | | Result | | | |
| to | | | | | | | | | | |
| 11/19/2020 | | Initial - Regular | | | Nathan | Approved | | | | |
| 11/17/2020 | | Initial - Regula | ır | | Nathan 1 | | | 1st Rejection | | |
| Fail Items | | | | | | | [₽] Expor | t to Excel | X Clear Filters | |
| Fail Date | Room | | Area | Res | ponsibility | Fail Item | E Ethoi | Emergen | cv | |
| to | | | | | | | | | v | |
| 11/17/2020 | Kitchen - Front - Ce | First Floor - enter | Electrical Hazards | Owr | ner | Repair/Replace defective GFCI outlet near stove | | No | | |
| 11/17/2020 | Kitchen - Front - Ce | First Floor - enter | Refrigerator | Owr | ner | Install all shelving and s bars property | upport | No | Ţ | |





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.



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.

| | Vendor # | * | | | Vendor Name | | | | |
|---|----------|-------------------------|--|----------------|-------------------|----------------|---------------|--------------|--|
| | | | | | | | | | |
| 4 | v000 | | | | | | | | |
| | | | | | 됨 Export to Excel | | | | |
| | | Check Date * | | Check Number * | | Payment | ayment Amount | | |
| | | to | | × | | | A V | | |
| | 4 | 3/28/2017 | | | |)) | A | | |
| | | | | | Export to | Excel | Export to PDF | Tilters 🛞 | |
| | | Tenant Code Tenant Name | | Unit Add | Iress Pa | Payment Amount | | ment Details | |
| | | | | | | v | | | |
| | | t11 | | | (\$ | 328.00) | | | |





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.

| Vendor # | Vendor Name | Client # | Tenant Name | Unit ID | Unit Address | Voucher Type | Sta |
|----------|-------------|----------|-------------|---------|--------------|--------------|------------|
| | | | | | | | |
| V249 | | | Angel | 13 | 54 Greer | AOV | Aba Car |
| V249 | | | Angel | 13 | 54 Greer | AOV | Aba Car |
| | | | | | | | Day |

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.

| YES | | | | | |
|----------------|--|--|--|--|--|
| Please proceed | | | | | |

Click the with my request 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 Onext to either Checking or Saving.





- 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.



Upload an RFTA

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

This page prompts owners to provide information about the voucher number and unit listed on the RFTA. 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.

| Vendor # | Tenant Name | Client # | Address | Step | Detail |
|----------|-------------|----------|---------|------|--------|
| | | | | • | |
| - | | | | | |

Sign a Contract (Coming Soon)

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 RFTA packet to determine if the unit is affordable for the family, permitting the owner to determine affordability before completing the RFTA 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**.

