



# NEAHMA Rhode Island Agency Forum

**February 15, 2024**



# Agenda

- Introductions
- Agency Updates
- NSPIRE Overview
- HOTMA Overview
- MOR Tips & Tricks
- Procorem



# Staffing Updates

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# RIHousing Agency Updates

- **On-Site MORs: Effective January 1, 2024**

- New guidance for Required and Alternative Management Occupancy Review (MOR) procedures for Performance Based Contract Administrators (PBCAs).
- The **Office of Asset Management and Portfolio Oversight** published a [memo on October 20, 2023](#), that takes the place of prior guidance regarding remote MORs conducted by PBCAs during the COVID-19 pandemic and **reinstates the practice of on-site MORs**. This updated guidance is **effective with MORs scheduled on or after January 1, 2024**

- **Waitlist Policy**

- [Program Bulletin 2024-01](#)
  - This Program Bulletin provides guidance and establishes RIHousing's formal policy for requiring wait lists in LIHTC and RIHousing funded rental developments.
  - Anyone who wishes to be admitted to an assisted property or placed on a property's waiting list must complete an application which identifies the specific property name of where they are applying to.



- **National Standards for the Physical Inspection (NSPIRE)**
  - Sunsetting Uniform Physical Condition Standard (UPCS) and replacing Real Estate Assessment Center (REAC)
- **On May 11, 2023, HUD published the final NSPIRE rule that introduced changes to inspections for the Public Housing and Multifamily Housing programs. The rule and standards seek to:**
  - Require the same health and safety standards for all HUD housing portfolios
  - Specify the method and timeframe for the correction of the three categories of health and safety defects
  - Includes compatible changes in the HOME and HTF regulations
  - Effective for projects with new HOME or HTF commitments made on or after October 1, 2023
    - Compliance date established for CPD programs is October 1, 2024



# NSPIRE

- **Standards Notice Published June 22, 2023** ([Federal Register](#))
  - Includes the H&S classifications of **Life-threatening, Severe, Moderate, and Low**
  - Designates the three inspectable areas: **Unit, Inside, and Outside.**
  - Eight critical focus areas:



- **Effective January 2, 2024, RI Housing began using the NSPIRE inspection protocols for all LIHTC inspections.**
- To learn more about NSPIRE, please visit the HUD site:  
[https://www.hud.gov/program\\_offices/public\\_indian\\_housing/reac/nspire](https://www.hud.gov/program_offices/public_indian_housing/reac/nspire)



## 8823's will be issued on any Life-threatening or Severe finding

(Multiple Units)  
Health and Safety Report  
NSPIRE



Scheduled: 01/30/2024

Closed:  
Score:

ID:

### Inspection Results - Health/Safety Only

Outside											
Location	Item	Results	Notes	Pic	Date	Fixed	Sev	HUD Pts	Adj Pts	Fix By	
Side of Building	Sharp Edges	Any item or component has a sharp edge that can puncture or	Broken window cut	1	01/30/24 09:43 BT		Severe	0.64	1.74	24H	
Inside											
Location	Item	Results	Notes	Pic	Date	Fixed	Sev	HUD Pts	Adj Pts	Fix By	
Hallways & Corridors (Bldg)	Conductors, Outlets, Switches	Outlet or switch is damaged		2	01/30/24 09:48 BT		LT	2.87	7.79	24H	





Three inspectable areas: **Unit, Inside, and Outside.**

### Inspection Results

Outside											
Location	Item	Results	Notes	Pic	Date	Fixed	Sev	HUD Pts	Adj Pts	Fix By	
Rear of Building	Roof Drain/Ponding	Gutter component is missing		1	01/30/24 09:45 BT		Mod	0.24	0.64	30D	
Side of Building	Sharp Edges	Any item or component has a sharp edge that can puncture or Broken window cut		2	01/30/24 09:43 BT		Severe	0.64	1.74	24H	
<b>Outside NSPIRE Totals</b>											
Life Threatening: 0/0		Severe: 1/1.74		Moderate: 1/0.64				Low: 0/0			

Inside											
Location	Item	Results	Notes	Pic	Date	Fixed	Sev	HUD Pts	Adj Pts	Fix By	
Basement (Bldg)	Foundation	Foundation is infiltrated by water		3	01/30/24 10:12 BT		Mod	0.26	0.71	30D	
Hallways & Corridors (Bldg)	Conductors, Outlets, Switches	Outlet or switch is damaged		4	01/30/24 09:48 BT		LT	2.87	7.79	24H	
<b>Inside NSPIRE Totals</b>											
Life Threatening: 1/7.79		Severe: 0/0		Moderate: 1/0.71				Low: 0/0			

Location	Item	Results	Notes	Pic	Date	Fixed	Sev	HUD Pts	Adj Pts	Fix By	
Laundry Room (Bldg)	Fire Extinguisher	The date on the fire extinguisher service tag has exceeded one year (Expired)		5	01/30/24 11:40 BT		LT	2.87	7.79	24H	
<b>Inside NSPIRE Totals</b>											
Life Threatening: 1/7.79		Severe: 0/0		Moderate: 0/0				Low: 0/0			

Unit										
Location	Item	Results	Notes	Pic	Date	Fixed	Sev	HUD Pts	Adj Pts	Fix By







# - Things to Think About

- Get trained!
  - focusing on safety and avoiding normal wear and tear issues
  - Provide staff with uniform training on NSPIRE standards
  - focus on new standards
- Integrate NSPIRE standards with Standard Operating Procedures
  - Update your annual inspections
- Keep an eye out for HUD updates and resources
- Keep an eye out for bulletins from RI Housing



## Questions and Feedback

[NSPIRE@hud.gov](mailto:NSPIRE@hud.gov)  
or search for "HUD NSPIRE" found on HUD.gov





# HOTMA

Housing Opportunity Through Modernization Act of 2016 (HOTMA)

THIS IS NOT A TRAINING



# Affected Programs

- Public Housing
- Section 8: HCV
- Section 8: PBV
- Section 8: Multifamily
- HOME
- HOPWA
- Housing Trust Fund
- Section 811
- LIHTC



# HOTMA - Changes

- Income definition
  - Now only lists exclusions
  - Is now amount received, not entitled to
- Student financial assistance calculations
  - Calculation has changed
- Foster rules
  - All income excluded
- Interim Recert Rules
- Eligibility for those who own homes or have over \$100,000 in assets \*\*\* recently updated
- Changes to deductions
  - Some will change annually
- Asset exclusions
  - Retirement accounts
- Passbook savings rate cap changes
- EIV report changes



# HOTMA - Forms!

## O/A's Responsibility

- Policies on assets and real estate
- Update Tenant Selection Plan
- Update EIV Policy (IRs)
- Update rejection letter
- Update Application/ Pre-Application
- Potentially update House Rules

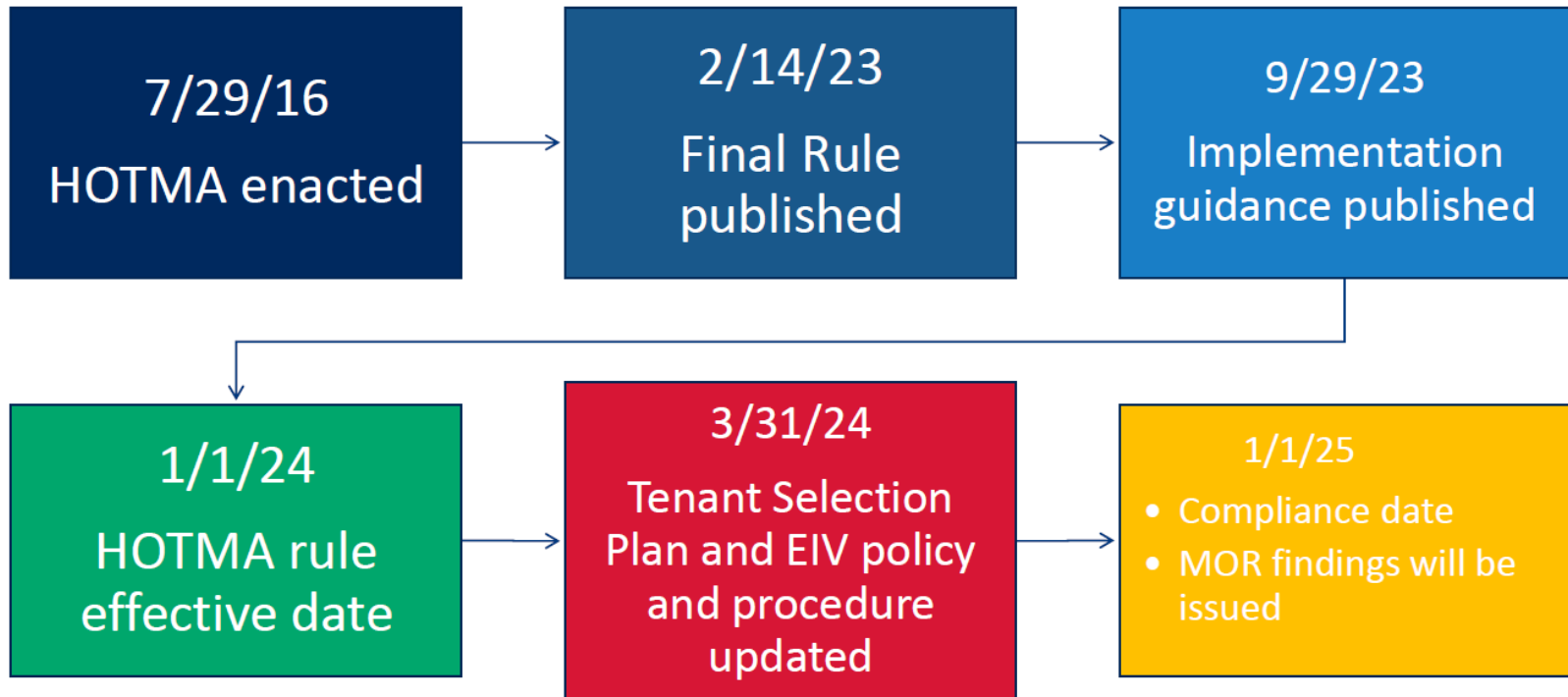
## HUD's Responsibility

HUD will be releasing

- Updated Lease
- Updated 9887
- Updated 50059/50059a
- Updated 9834
- Updated HUD Fact Sheet
- Updated VAWA Addendum



# MF Implementation Timeline



# Tenant Selection Plan



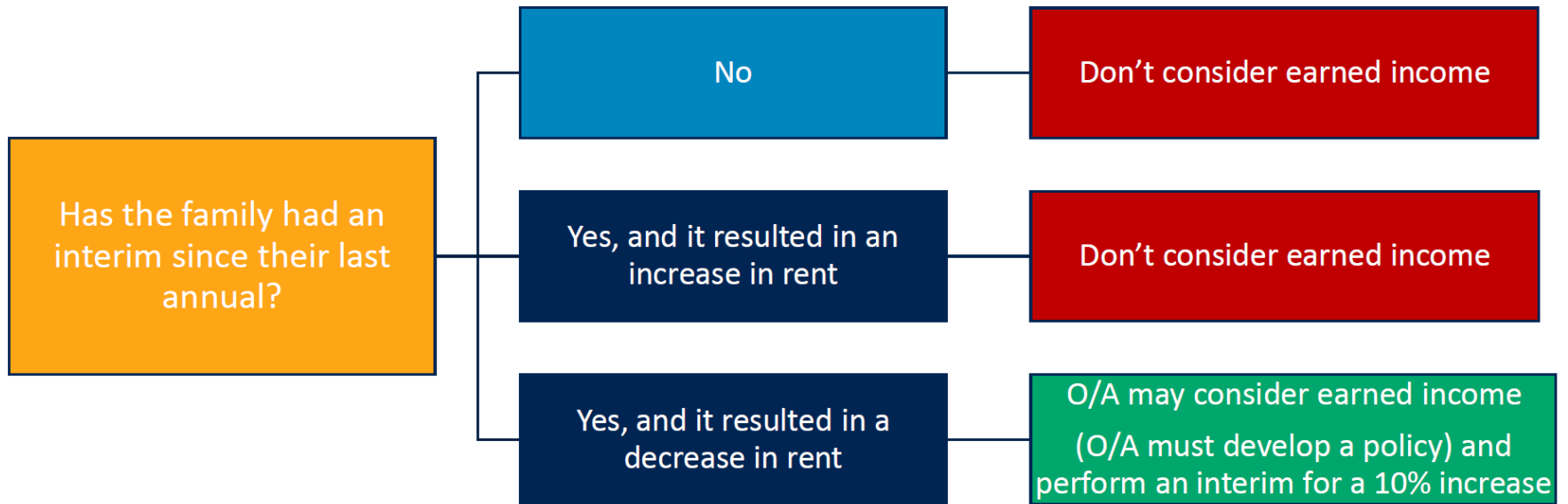
## Corrections by 3/31/2024

- De minimis errors
- Self-certification of net family assets
- Hardship exemptions for health and medical care/disability assistance expenses and child care
- IRs: increases, decreases, and reporting
- Revocation of consent
- Determination of family income using Safe Harbor verifications



# Interim Recertifications

A family reports an increase in earned income between annuals.





# EIV Policies and Procedures

Corrections by 3/31/2024

Use during IRs

- Earned income increases
- Income Reports when using Safe Harbor verifications
- Note: MFH Owners must continue to follow their existing Tenant Selection Plans and EIV policies & procedures until the MFH Owner's software is compliant with TRACS 203A.



# After Your Software Update

- Passbook Savings Rate – Do not change
- Use the revised Tenant Consent form (form HUD–9887/9887A) and Fact Sheets (“How Your Rent is Determined”)
- Begin using the revised Model Leases at the expiration of a family’s lease term, with 60 days notice
- Implement your revised Tenant Selection Plan and EIV policies and procedures
- All tenant data submissions must comply with the HOTMA regulations



# HOTMA - MORs

- Prior to January 1, 2025, MFH Owners will not be penalized for HOTMA-related tenant file errors during Management and Occupancy Reviews (MORs). Instead, the Contract Administrator will issue observations with corrective actions.
- After January 1, 2025 Owners must correct all HOTMA-related observations that were issued by Contract Administrators during 2024.



# HOTMA – The Word from HUD

- There are still many items HUD needs to clarify or update
  - Updated forms
  - Tracs is not ready yet
- Asset limitations guide is coming for HOTMA
- Guide for management reviews is also coming
- FAQs are coming out
- Webinars for Tenants (!) coming soon
- Webinars for O/As coming soon



Asset limitations can't be enforced until new lease is issued and signed, and software and TSP updated.

**HUD resources:** [https://www.hud.gov/program\\_offices/housing/mfh/hotma](https://www.hud.gov/program_offices/housing/mfh/hotma)

**Dedicated HOTMA email address:** [MFH\\_HOTMA@hud.gov](mailto:MFH_HOTMA@hud.gov)



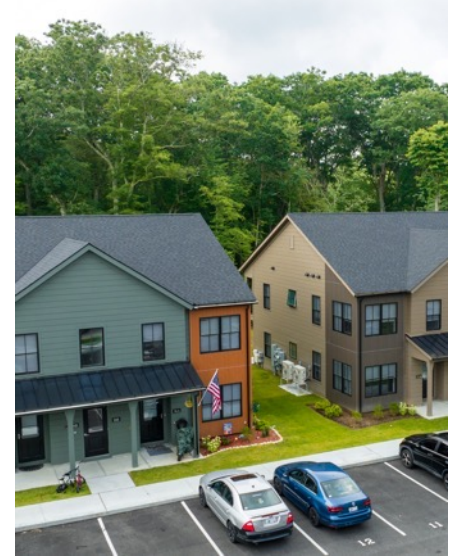
# HOTMA - Things to Think About

- Get trained!
- Update your software
- Update your policies and forms
- Keep an eye out for HUD updates and resources
- Keep an eye out for bulletins from RI Housing



# HOTMA and LIHTC

- IRS has verbally confirmed its their intention to follow the HOTMA final rule in regard to determining income and assets and will allow for self-certification of assets when the cash value does not exceed \$50,000
- Our tax credit policies will continue to mirror Section 8 as far as income and asset verification is concerned
  - If you can use a verification for Section 8 we will accept it for tax credit
  - We will not be making the tax credit program more restrictive in terms of eligibility
  - **This is not yet in effect! We will post a program bulletin when we make any changes to our TC policies**



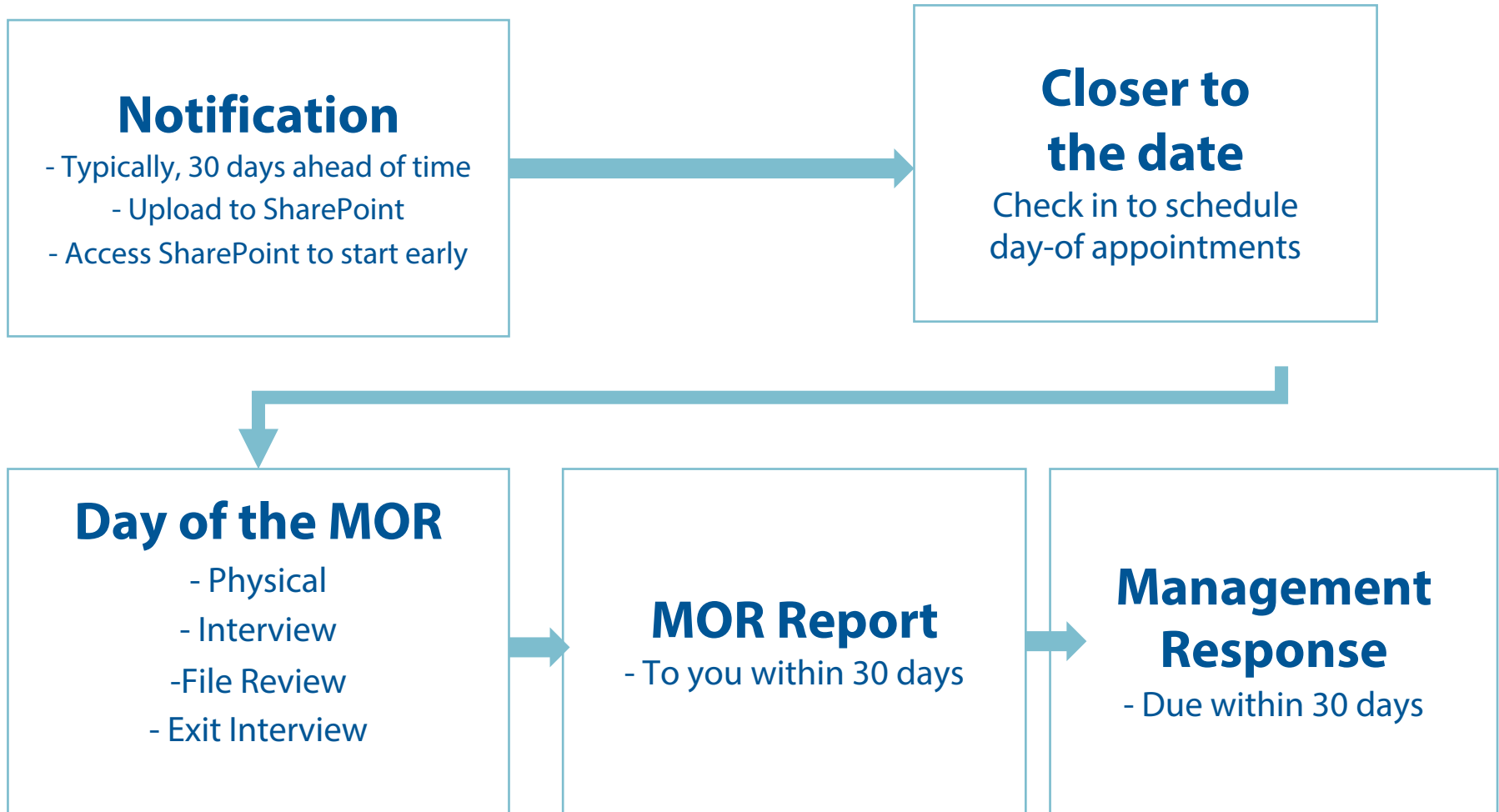


# MORs – Tips and Tricks

Management and Occupancy Reviews for PBCA



# Management and Occupancy Review (MOR) Process





# Resources On Our Website

[www.rihousing.com/section-8-contract-administration/](http://www.rihousing.com/section-8-contract-administration/)

## SECTION 8 & 811 CONTRACT ADMINISTRATION

### As Contract Administrator, RIHousing:

- Processes monthly vouchers
- Processes rent and utility adjustments
- Processes contract renewals and
- Performs Management and Occupancy Reviews which includes physical inspections

Management and Occupancy Reviews



Annual Rent Adjustments (OCAFs and RCSs)



Contract Renewals



# MOR Streamlining

- Previously we have been performing MORs in waves, at a rate of about once every 18 months.
- In July of 2022 HUD issued a final rule on risk-based Management and occupancy reviews
- Any MOR performed after 9/26/2022 will have it's next MOR determined by a combination of it's score and risk-rating
- It looks like we'll be finishing this up this summer.
- Most MORs are falling under the 3-year schedule.
- You can now ask your AM when your next MOR needs to happen by (no promises)



<b>Previous MOR:</b>	Unsatisfactory	Below Average	Satisfactory	Above Average	Superior
<i>Next MOR must be conducted within...</i>					
<b>Risk Classification:</b> Troubled	12 months of previous MOR	12 months of previous MOR	12 months of previous MOR	12 months of previous MOR	12 months of previous MOR
<b>Risk Classification:</b> Potentially Troubled	12 months of previous MOR	12 months of previous MOR	12 months of previous MOR	12 months of previous MOR	12 months of previous MOR
<b>Risk Classification:</b> Not Troubled	12 months of previous MOR	12 months of previous MOR	24 months of previous MOR	36 months of previous MOR	36 months of previous MOR



# MOR Streamlining *(cont.)*

- An MOR must be conducted within six months of a management or ownership change
- CA staff must review all documentation in the tenant file going back to the date of the last MOR.
  - This means if you had an above average and your last MOR was 3 years ago, we will be looking at 3 years of certifications in your files.
- The Final Rule also clarifies that even though HUD is publishing this schedule, HUD or a CA retains the right to schedule a MOR at any time if:
  - HUD publishes a new MOR schedule after public comment;
  - Documented concerns at the project warrant an assessment; or
  - The project's condition or risk rating worsens.



# PROLINK™ SOLUTIONS

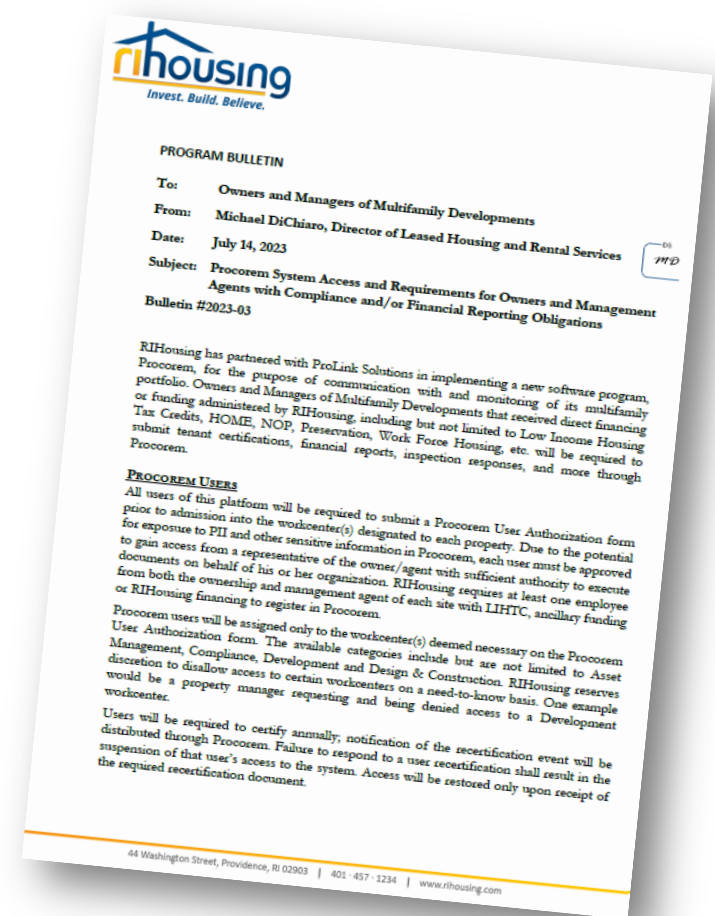


**ProLink recommends Google Chrome for best results,  
but Microsoft Edge will work too.**



## Program Bulletin #2023-03 circulated on July 14, 2023

- Procorem Users
- Procorem Workcenters
- Tenant Events
- Data Integrity
- Market Units
- Asset Management
- Multifamily Inspections & File Reviews
- Owner's Certifications
- Navigating the Workcenters





## Data Integrity

- HUD Data Reporting required annually
  - RIHousing submits LIHTC tenant data via XML
- Certain fields must match between your property management software and Procorem
  - Property Name
  - BIN
  - Building Name (Address)
  - Unit #
- Excel report in Compliance workcenter



## Market Units

### MARKET UNITS

Developments with less than 100% affordable units are hereby required to report on market units in Procorem. In LIHTC properties, a market unit is a non-LIHTC unit. Similarly, sites with ancillary programs may have an affordable unit percentage less than 100%, resulting in units with no affordable programs associated to them; for the purpose of data collection, those are also market units.

Reporting requirements on market unit households is limited to the apartment number, tenant paid rent, utility allowance (if applicable), and gross rent. Household names are not required as part of the tenant event submission. Owners and management agents may opt to report household names as “Market” and “Unit” as the first and last names, respectively.







# Files





### **Files**

Upload any file type instantly. Easily upload multiple documents at the same time up to 2 GB at once.

### **Commenting**

Collaborate on files right within Procorem by commenting on the file record. All comments are integrated with your email to ensure your team stays on task.

### **Versioning**

All versions of files are stored and recorded in Procorem. If you would like to restore or delete an old version of a file, users with the right access can do it with the push of a button.

### **File Activity**

All file activities such as downloading, uploading, commenting, deleting, moving, copying and more are fully recorded in Procorem so you have a complete audit history of all activity.

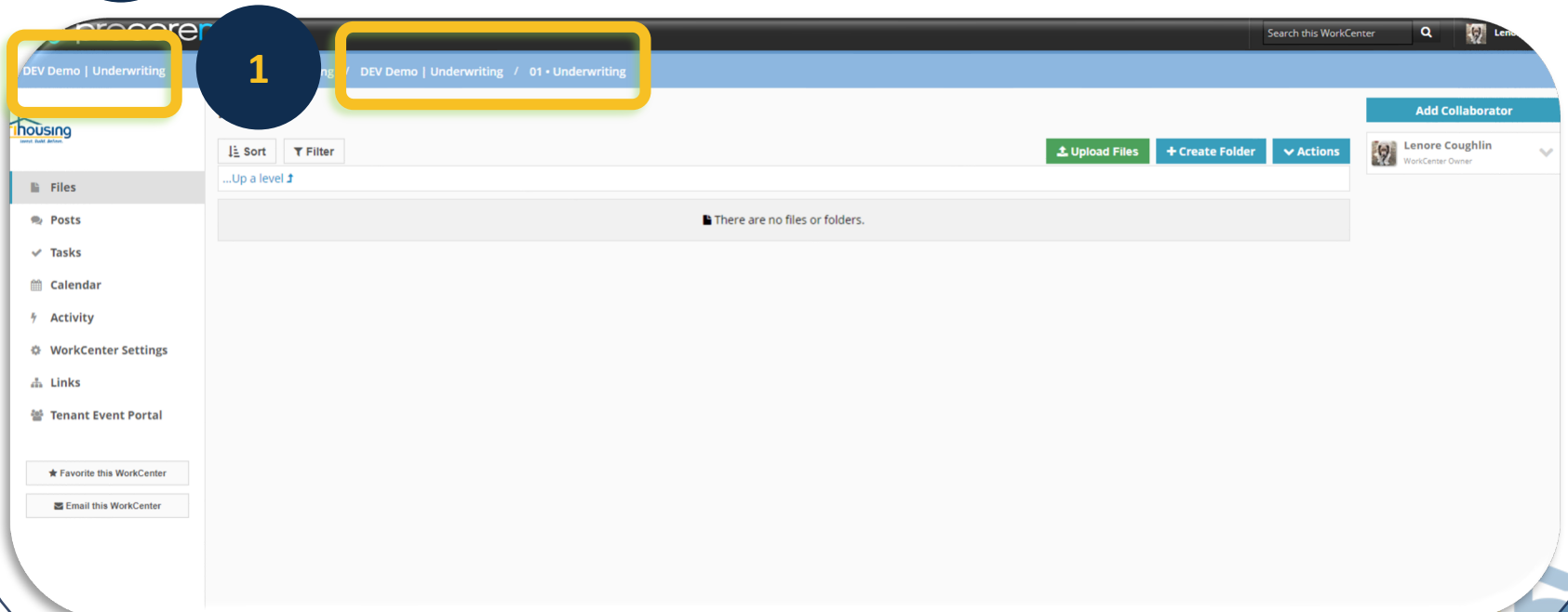




## Uploading Files

1

Navigate to the workcenter where you would like to upload file(s).



The screenshot displays the Procorem interface. The breadcrumb trail at the top reads "DEV Demo | Underwriting / DEV Demo | Underwriting / 01 - Underwriting". The "DEV Demo | Underwriting" portion is highlighted with a yellow box. A large blue circle with the number "1" is overlaid on the breadcrumb. The main content area shows a file upload interface with buttons for "Upload Files", "Create Folder", and "Actions". The user profile "Lenore Coughlin" is visible in the top right corner.

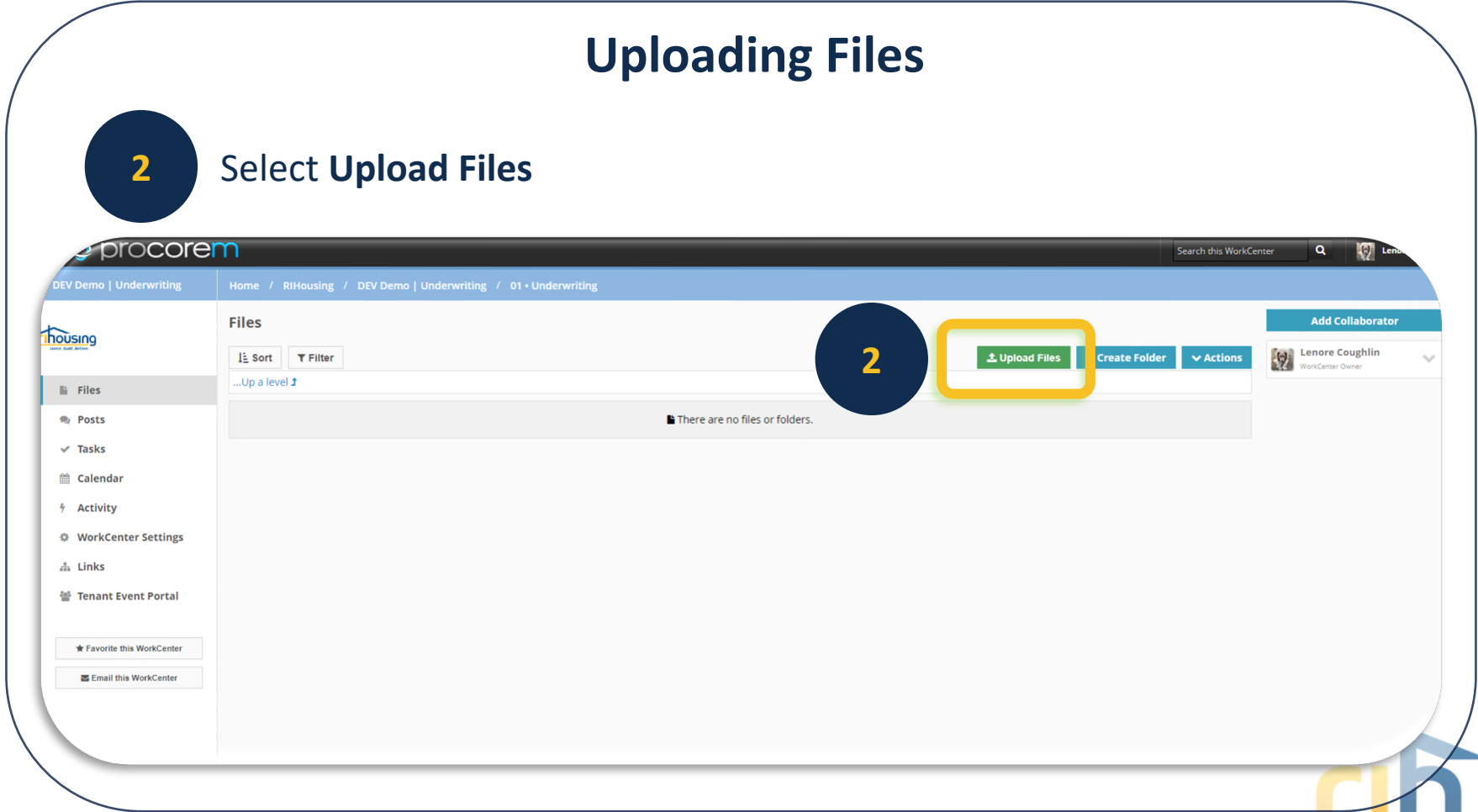




# Uploading Files

2

Select Upload Files



The screenshot shows the Procorem web interface. The breadcrumb trail is: Home / RIHousing / DEV Demo | Underwriting / 01 - Underwriting. The left sidebar contains navigation options: Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area is titled 'Files' and contains a message: 'There are no files or folders.' The 'Upload Files' button is highlighted with a yellow box, and a blue circle with the number '2' is overlaid on the interface to indicate the current step.

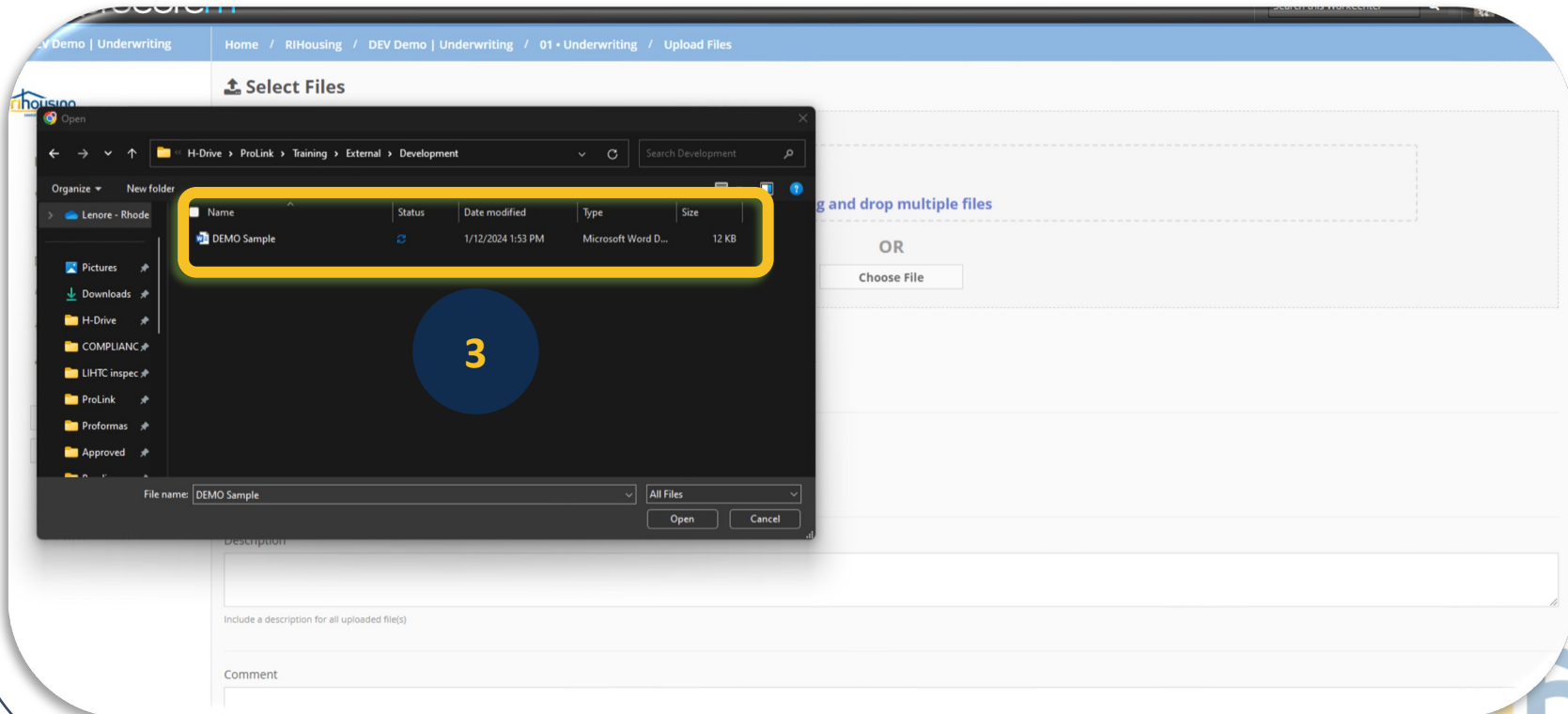




## Uploading Files

3

**Drag and Drop** or click **Choose File**. Both options will require you to select the files to be uploaded from your computer.



The screenshot shows a web application interface for uploading files. The browser address bar indicates the path: Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting / Upload Files. The page title is "Select Files".

The interface includes a "Select Files" button, a dashed box for "Drag and drop multiple files", an "OR" separator, and a "Choose File" button. Below these are fields for "Description" and "Comment".

A Windows File Explorer window is open, showing the path: H-Drive > ProLink > Training > External > Development. The file list contains one file: "DEMO Sample", which is highlighted with a yellow box. A large blue circle with the number "3" is overlaid on the File Explorer window.

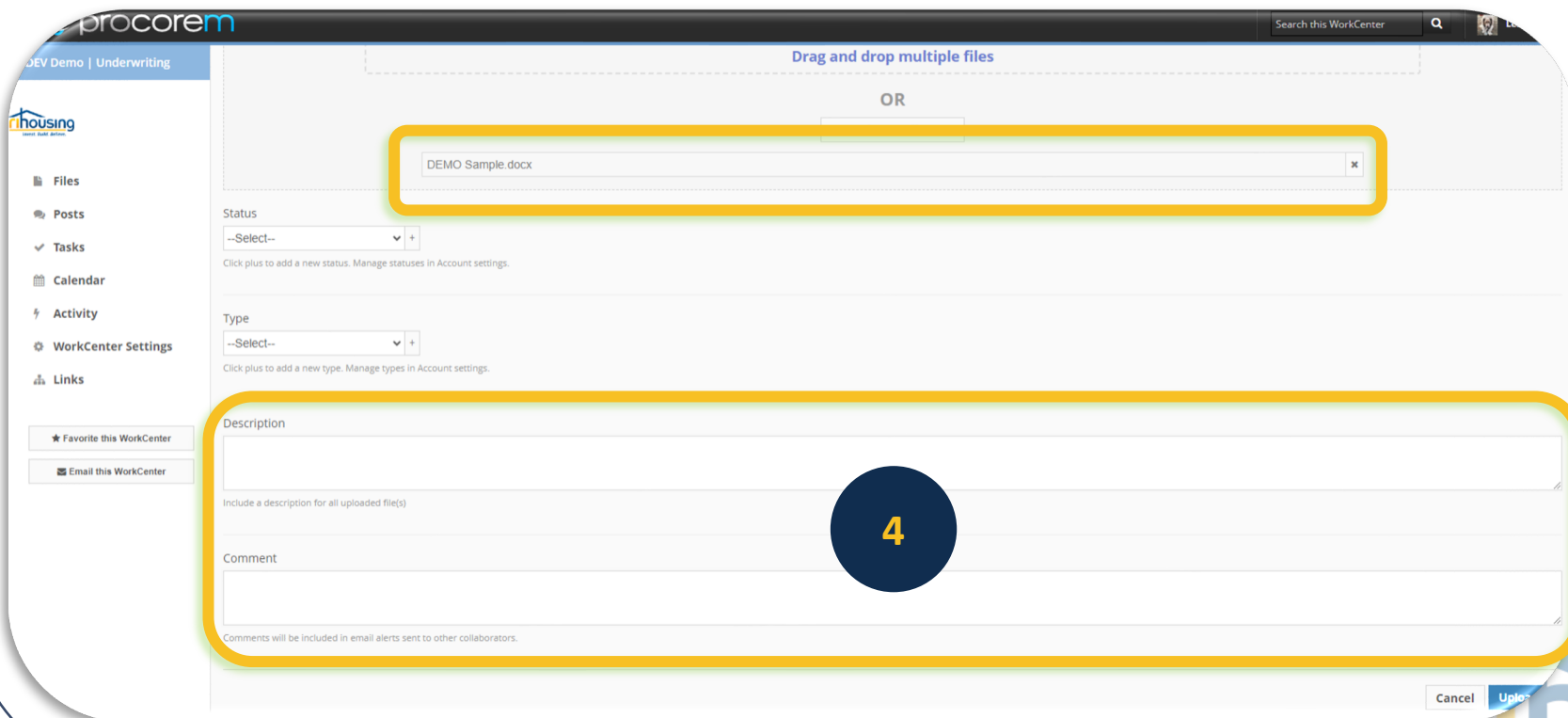
Name	Status	Date modified	Type	Size
DEMO Sample		1/12/2024 1:53 PM	Microsoft Word D...	12 KB



## Uploading Files

4

After your selection has been added to the list of files, you have the option to enter a Description and/or Comment.



The screenshot shows the Procorem file upload interface. At the top, there is a search bar and a user profile icon. Below that, a dashed box contains the text "Drag and drop multiple files" and "OR". A file named "DEMO Sample.docx" is listed in a table with a close button (X) on the right. Below the file list, there are two dropdown menus: "Status" and "Type", both currently set to "--Select--". Below these are two text input fields: "Description" and "Comment". The "Description" field has a placeholder text: "Include a description for all uploaded file(s)". The "Comment" field has a placeholder text: "Comments will be included in email alerts sent to other collaborators." At the bottom right, there are "Cancel" and "Upload" buttons. A large blue circle with the number "4" is overlaid on the "Description" and "Comment" fields.

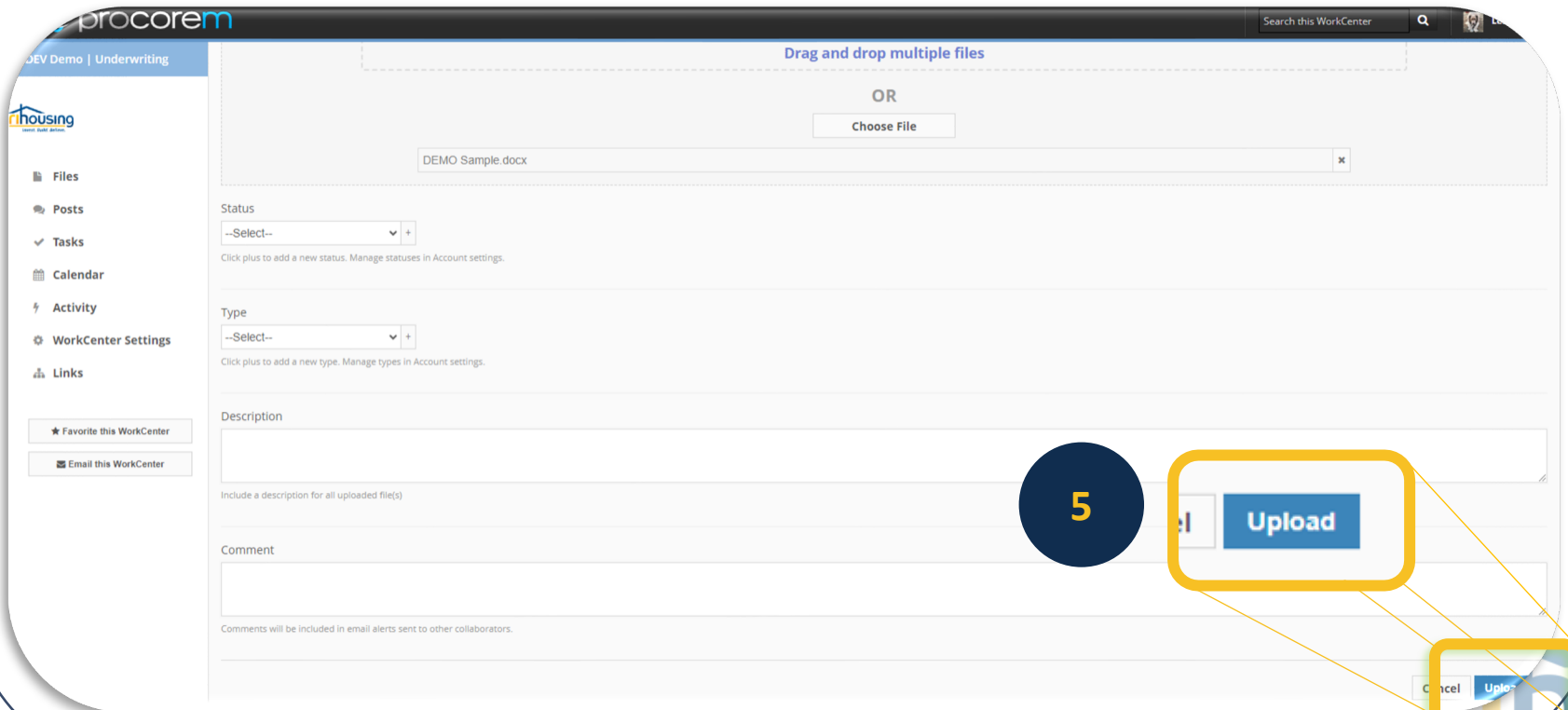
4



## Uploading Files

5

Click **Upload** to complete the process.



The screenshot shows the Procorem file upload interface. At the top, there is a search bar and a user profile icon. Below that, a dashed box indicates where to "Drag and drop multiple files". An "OR" button and a "Choose File" button are present. A file named "DEMO Sample.docx" is shown in a list with a close button (x). Below the file list, there are dropdown menus for "Status" and "Type", both currently set to "--Select--". There are also buttons to "Favorite this WorkCenter" and "Email this WorkCenter". The "Description" field is empty, and the "Comment" field is also empty. At the bottom right, there are "Cancel" and "Upload" buttons. A yellow circle with the number "5" is placed over the "Upload" button, and a yellow box highlights the "Upload" button. A yellow box also highlights the "Upload" button in the bottom right corner of the interface.

5

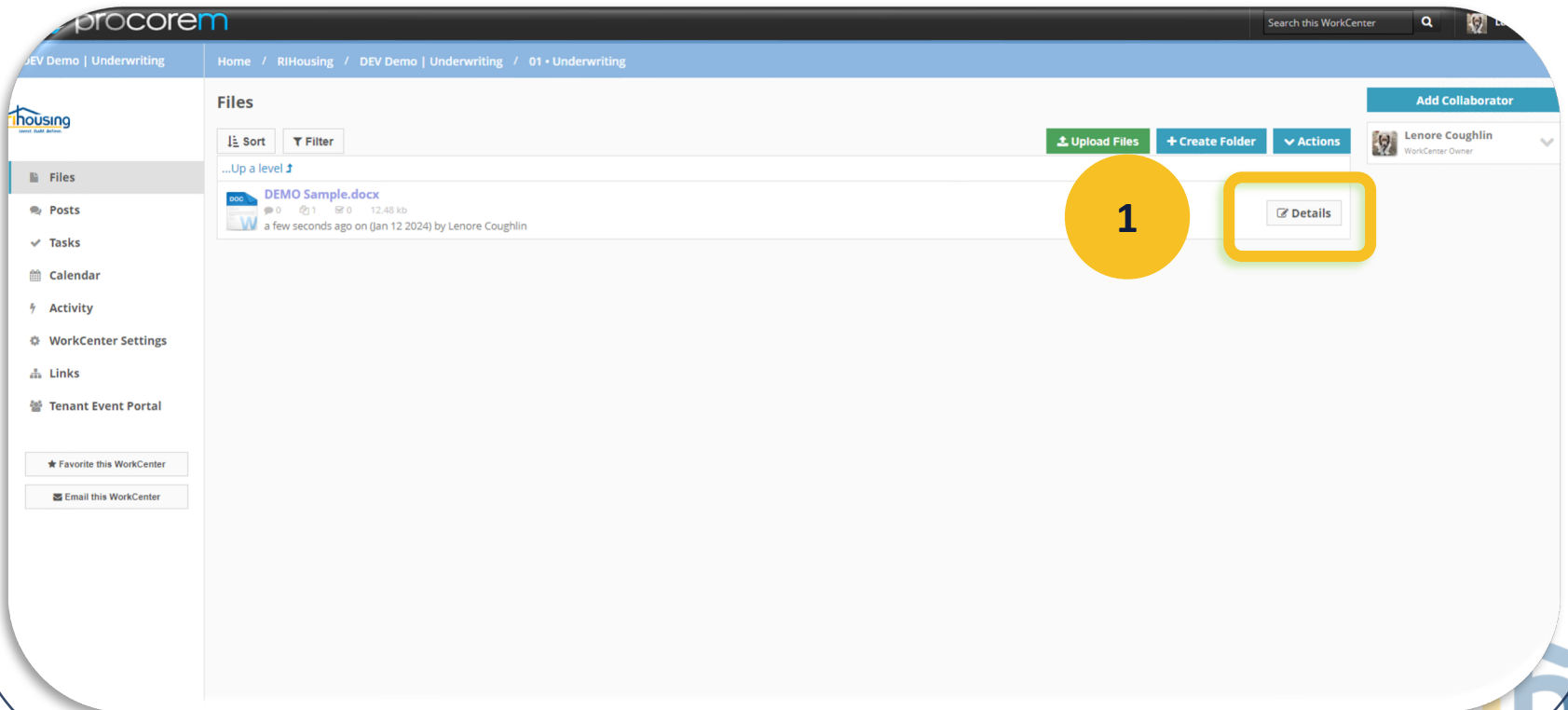
Upload

Cancel Upload



## Upload New Versions of Files

**1** Find the original file in the workcenter. Click on **Details**.



The screenshot displays the Procurement interface for a workcenter. The breadcrumb trail is: Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting. The main content area is titled "Files" and contains a list of files. A file named "DEMO Sample.docx" is highlighted, with a yellow circle containing the number "1" next to it. The file details show it was uploaded "a few seconds ago (on Jan 12, 2024)" by Lenore Coughlin. A yellow box highlights the "Details" link in the file's action menu. The interface also includes a left sidebar with navigation options like "Files", "Posts", "Tasks", "Calendar", "Activity", "WorkCenter Settings", "Links", and "Tenant Event Portal". At the top right, there are buttons for "Upload Files", "Create Folder", and "Actions". A user profile for "Lenore Coughlin" is visible in the top right corner.

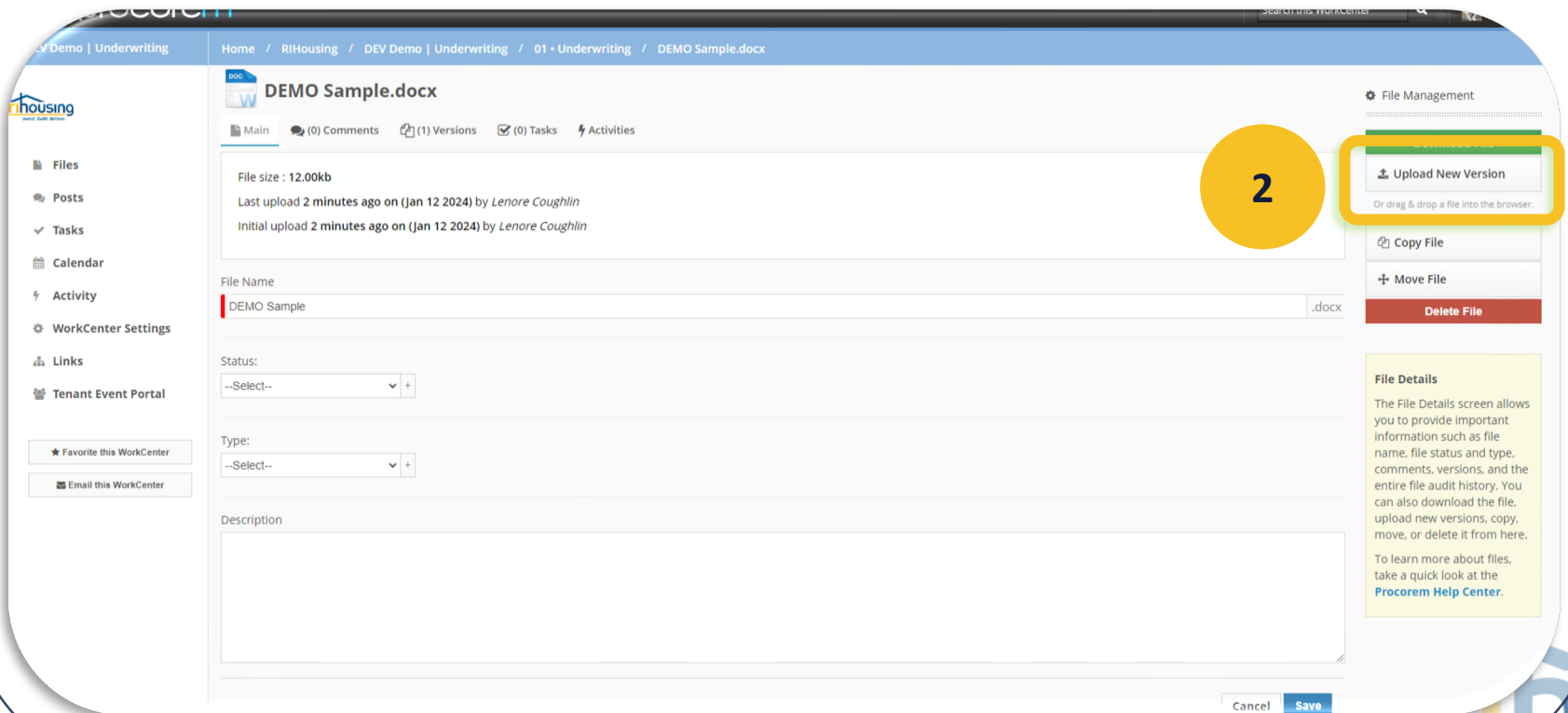






## Upload New Versions of Files

### 2 Select Upload New Version.



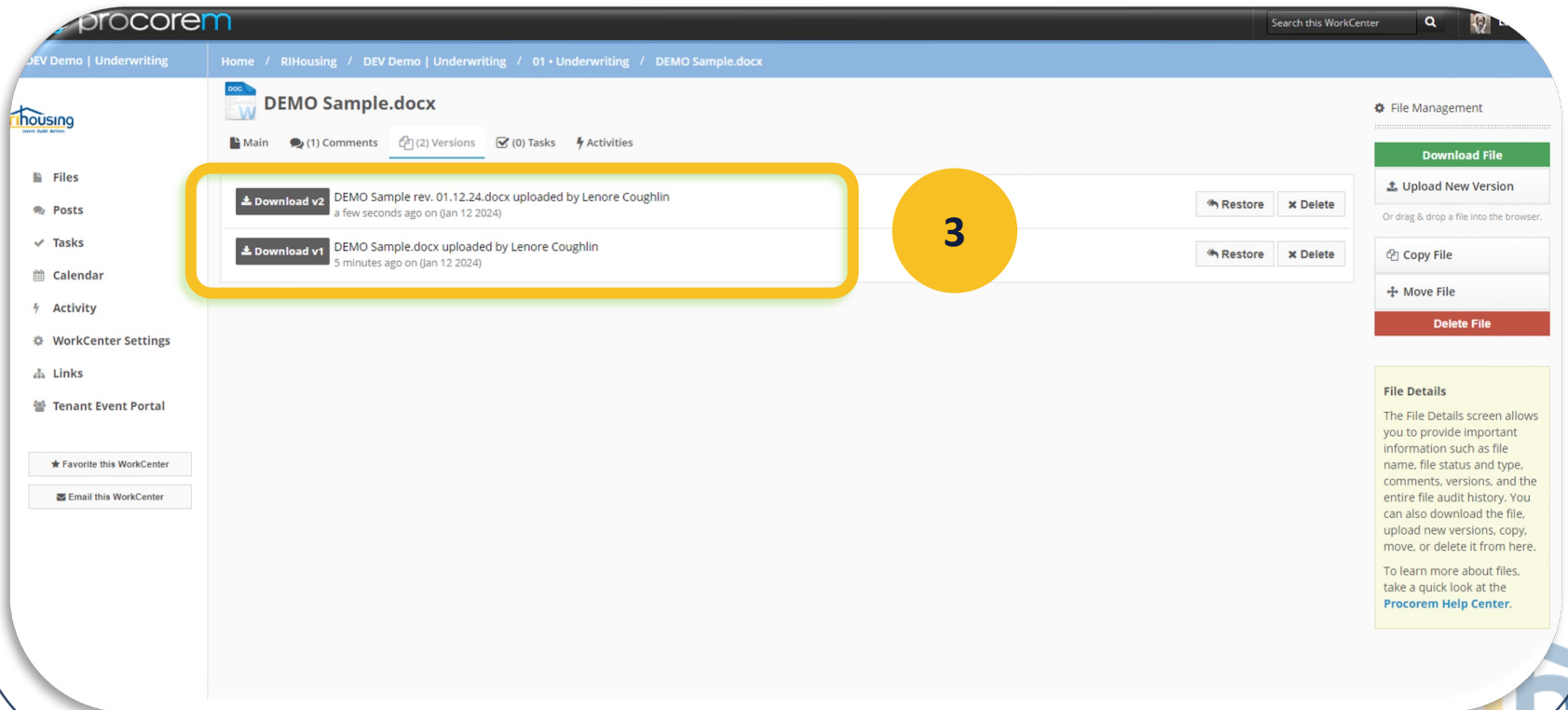
The screenshot displays the Procorem file management interface for a file named "DEMO Sample.docx". The interface includes a left sidebar with navigation options like "Files", "Posts", "Tasks", "Calendar", "Activity", "WorkCenter Settings", "Links", and "Tenant Event Portal". The main content area shows file details such as "File size: 12.00kb", "Last upload 2 minutes ago on (Jan 12 2024) by Lenore Coughlin", and "Initial upload 2 minutes ago on (Jan 12 2024) by Lenore Coughlin". Below this, there are fields for "File Name" (DEMO Sample.docx), "Status" (dropdown menu), and "Type" (dropdown menu). A "Description" field is also present. On the right side, there is a "File Management" panel with buttons for "Upload New Version", "Copy File", "Move File", and "Delete File". The "Upload New Version" button is highlighted with a yellow circle and a "2" in a yellow circle, indicating the next step in the process. A "File Details" section on the right provides information about the file and a link to the Procorem Help Center. At the bottom right, there are "Cancel" and "Save" buttons.



## Upload New Versions of Files

3

Select the new version of the file from your computer.



The screenshot displays the Procorem file management interface for a file named "DEMO Sample.docx". The "Versions" tab is active, showing two versions of the file:

- Download v2**: DEMO Sample rev. 01.12.24.docx uploaded by Lenore Coughlin a few seconds ago on (Jan 12 2024)
- Download v1**: DEMO Sample.docx uploaded by Lenore Coughlin 5 minutes ago on (Jan 12 2024)

The "Download v2" option is highlighted with a yellow box, and a yellow circle with the number "3" is placed next to it, indicating the step to select the new version. The interface includes a sidebar with navigation options (Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, Tenant Event Portal), a top navigation bar, and a right-hand panel with file management actions (Download File, Upload New Version, Copy File, Move File, Delete File) and a "File Details" section.

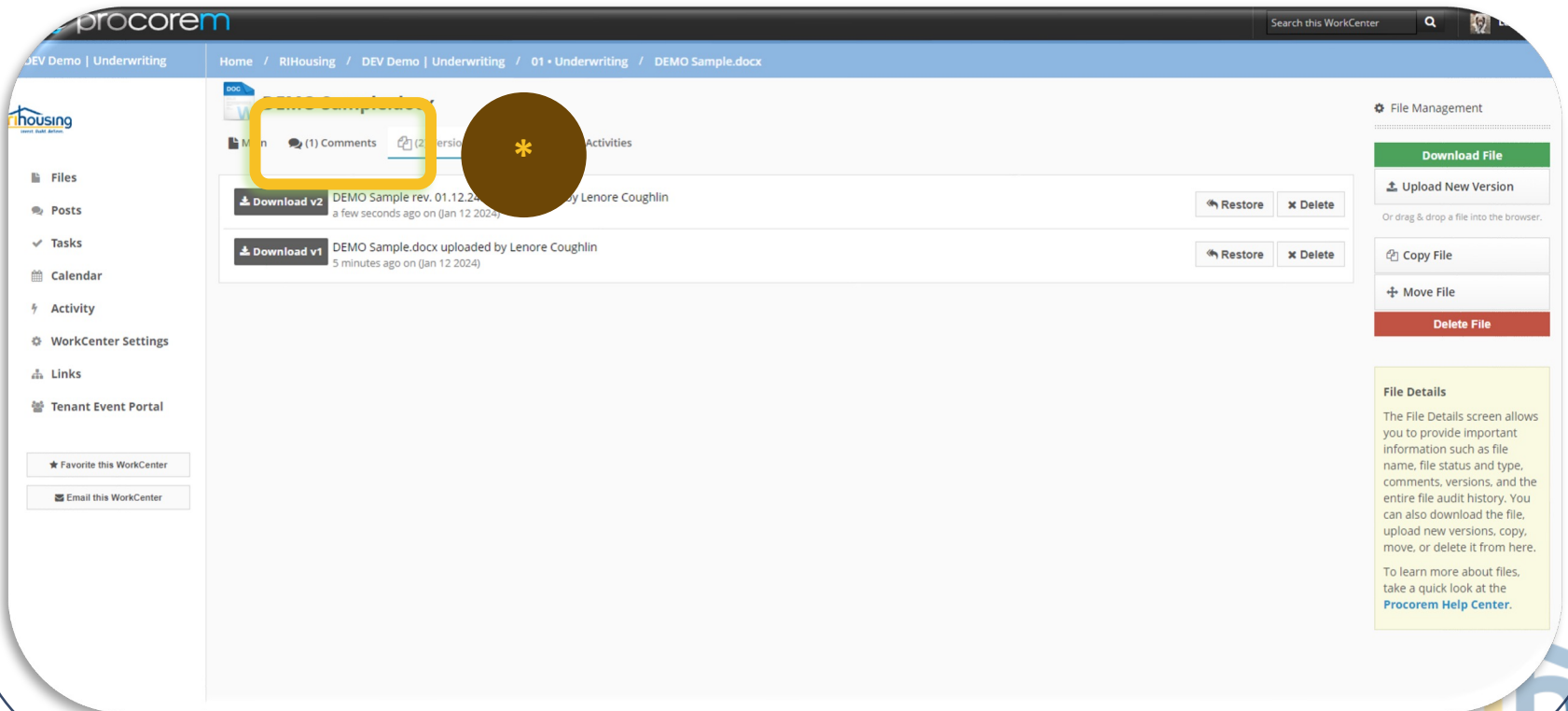
3



## File Comments



When a file version is added, Procorem creates a Comment to identify the user who uploaded it.



The screenshot displays the Procorem interface for a file named "DEMO Sample.docx". The breadcrumb trail is "Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting / DEMO Sample.docx". The left sidebar contains navigation options: Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area shows a file card with a yellow box highlighting the "(1) Comments" link and a yellow asterisk icon. Below the card, the version history is visible:

- Download v2**: DEMO Sample rev. 01.12.2024 uploaded by Lenore Coughlin a few seconds ago on (Jan 12 2024). Actions: Restore, Delete.
- Download v1**: DEMO Sample.docx uploaded by Lenore Coughlin 5 minutes ago on (Jan 12 2024). Actions: Restore, Delete.

The right sidebar includes "File Management" options: Download File, Upload New Version, Copy File, Move File, and Delete File. A "File Details" section explains that this screen allows users to provide important information such as file name, file status and type, comments, versions, and the entire file audit history. It also mentions that users can download the file, upload new versions, copy, move, or delete it from here. A link to the Procorem Help Center is provided.

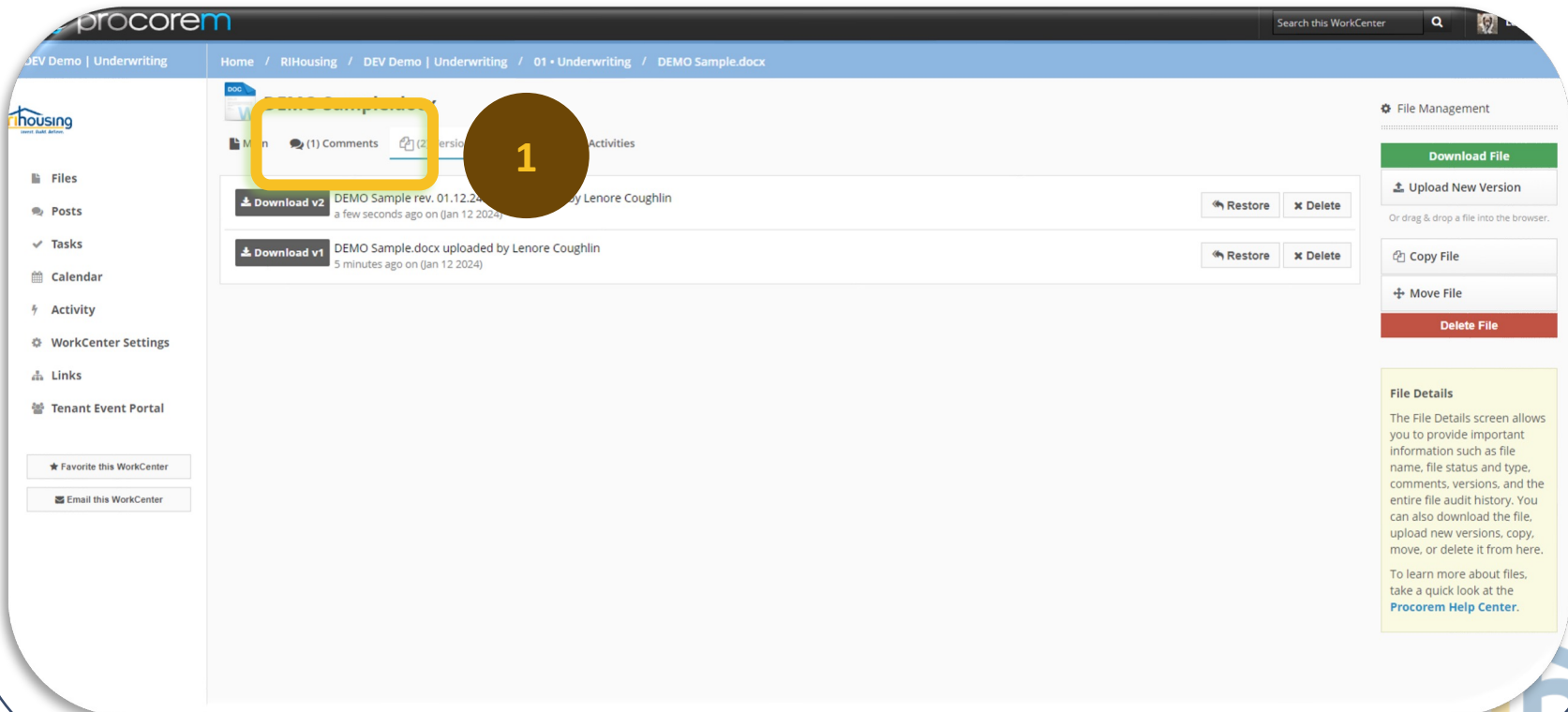




## File Comments

1

To add your own comment on a file within a workcenter, select the file and click on the **Comments** tab.



The screenshot displays the Procorem interface for a file named "DEMO Sample.docx". The breadcrumb trail is "Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting / DEMO Sample.docx". The file management section shows two versions: "Download v2" (uploaded a few seconds ago) and "Download v1" (uploaded 5 minutes ago). The "Comments" tab is highlighted with a yellow box and a circled "1". The "File Management" sidebar includes buttons for "Download File", "Upload New Version", "Copy File", "Move File", and "Delete File". The "File Details" section provides information about the file and a link to the Procorem Help Center.

**File Details**

The File Details screen allows you to provide important information such as file name, file status and type, comments, versions, and the entire file audit history. You can also download the file, upload new versions, copy, move, or delete it from here.

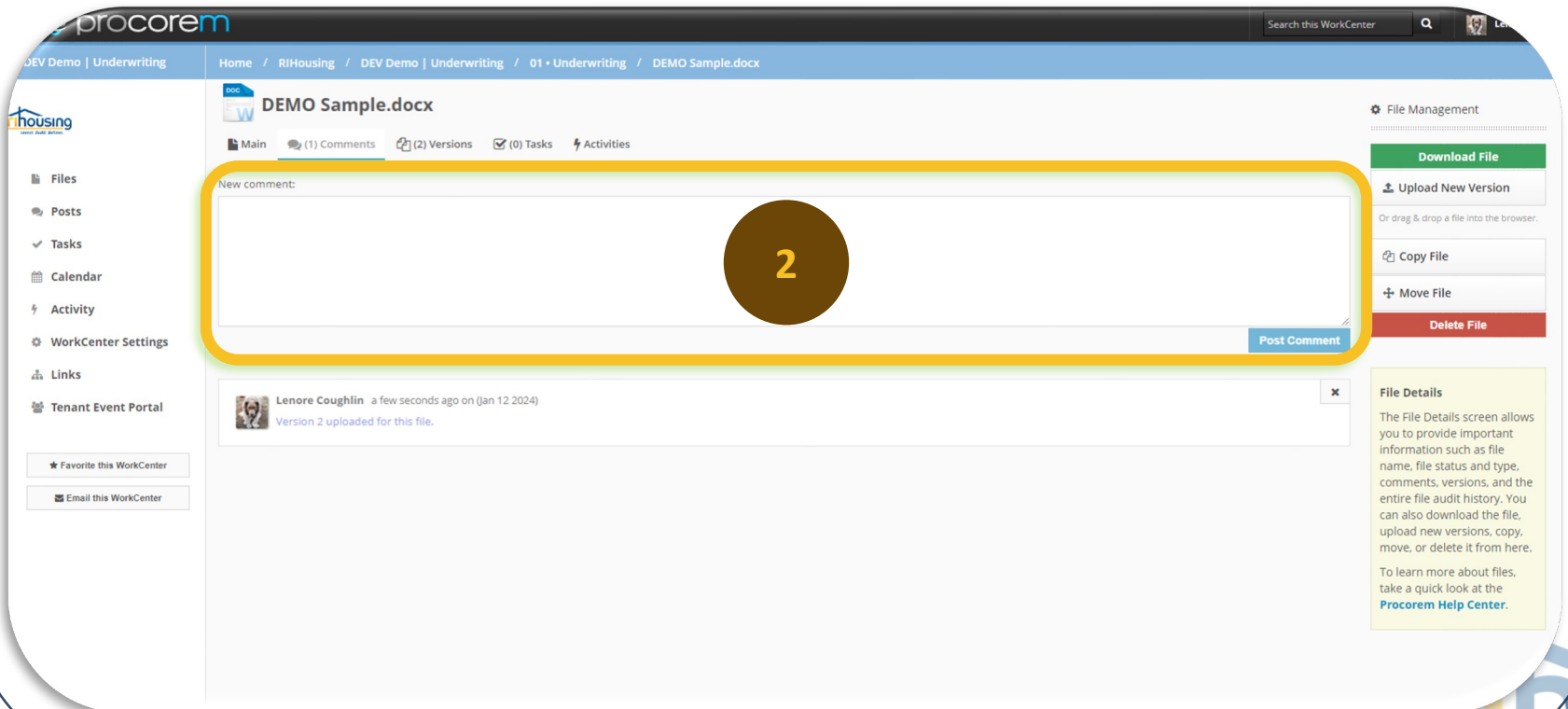
To learn more about files, take a quick look at the [Procorem Help Center](#).



## File Comments

2

Enter your comment and click **Post Comment** to add it to the file.



The screenshot displays the Procorem File Management interface for a file named "DEMO Sample.docx". The interface includes a navigation menu on the left with options like Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area shows the file name, a breadcrumb trail (Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting / DEMO Sample.docx), and a toolbar with icons for Main, Comments (1), Versions (2), Tasks (0), and Activities. A large text input field for "New comment:" is highlighted with a yellow border and contains a brown circle with the number "2". To the right of the input field is a "Post Comment" button. Below the input field, a comment by "Lenore Coughlin" is visible, stating "Version 2 uploaded for this file." On the right side, there is a "File Management" section with buttons for "Download File", "Upload New Version", "Copy File", "Move File", and "Delete File". A "File Details" section provides information about the file and a link to the "Procorem Help Center".

2



# Tasks





**Task Filtering** Easily sort your tasks by custom group, task status, who the task is assigned to, and when the task is due.

**Assignees** Tasks are assigned to a single user or multiple users.

**Approvals** Task completion requires the approval of RIHousing. Task approval may be revoked and the task re-opened at the discretion of RIHousing if a task is found to be incomplete.

**Followers** Those on the project that are not assignees or approvers may be identified as Followers to stay informed through email notifications as the task status progresses.





**Task Notifications** All tasks are fully integrated with email notifications. This ensures your team is kept up to speed as tasks are completed or as they fall behind.

**Task Management** Tasks can be managed on a project-by-project basis or easily viewed across all projects in a single screen.

**Task Statuses** Tasks progress through a variety of statuses depending on the information you have put in the task.

**My Tasks** Every user can see which tasks are associated to them across all the projects in a single view.



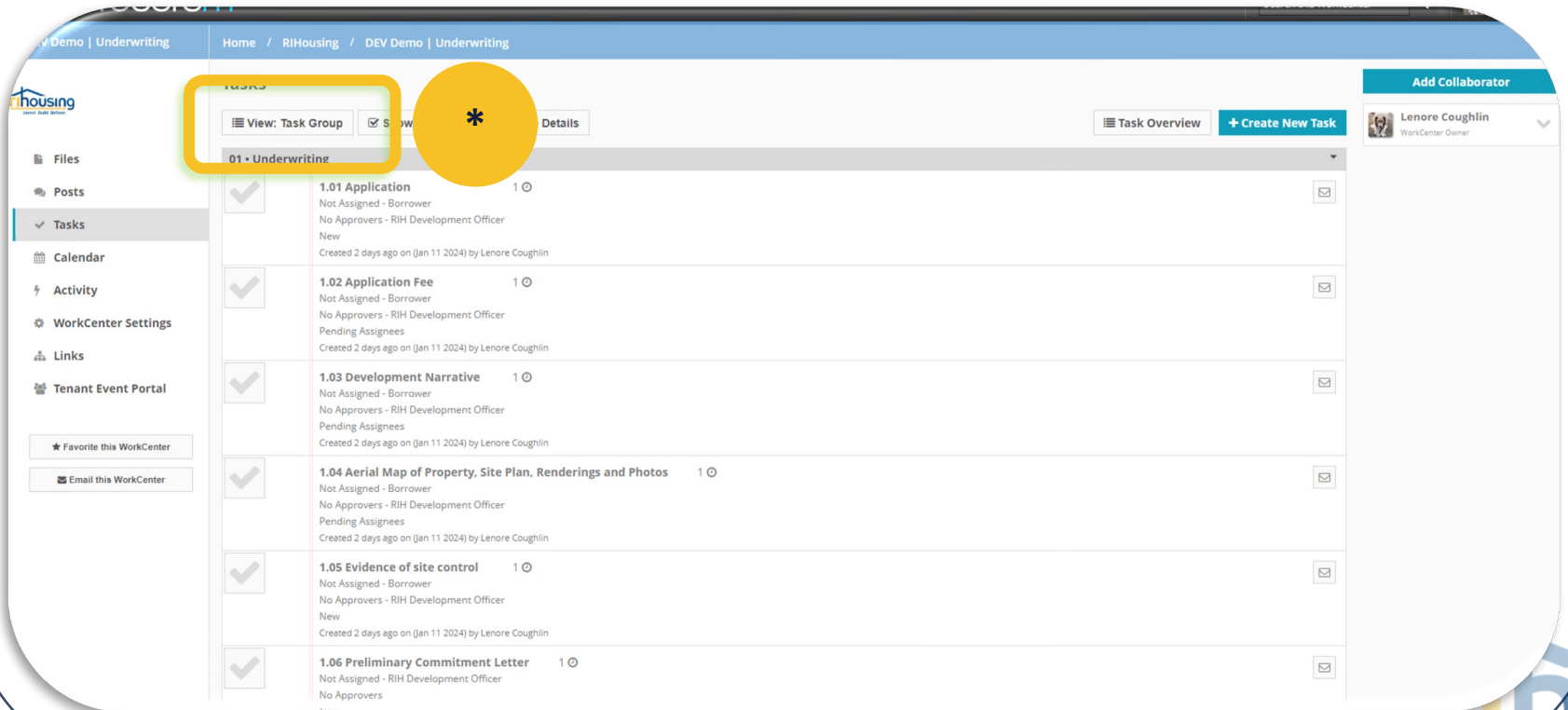




## Task Grouping



The default grouping is by Task Group, or the heading in the grey table headings. These group labels match the folder labels in Files.



The screenshot displays the Procorem interface for a workcenter. The left sidebar contains navigation options: Files, Posts, Tasks (selected), Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area shows a list of tasks under the heading "01 - Underwriting". The tasks are grouped by task group, with each group having a heading in a grey bar. A yellow box highlights the "View: Task Group" button, and a yellow circle highlights the asterisk icon in the table header. The tasks listed are:

Task Group	Task Name	Status	Created By
1.01 Application	1.01 Application	Not Assigned - Borrower	Lenore Coughlin
1.02 Application Fee	1.02 Application Fee	Not Assigned - Borrower	Lenore Coughlin
1.03 Development Narrative	1.03 Development Narrative	Not Assigned - Borrower	Lenore Coughlin
1.04 Aerial Map of Property, Site Plan, Renderings and Photos	1.04 Aerial Map of Property, Site Plan, Renderings and Photos	Not Assigned - Borrower	Lenore Coughlin
1.05 Evidence of site control	1.05 Evidence of site control	Not Assigned - Borrower	Lenore Coughlin
1.06 Preliminary Commitment Letter	1.06 Preliminary Commitment Letter	Not Assigned - Borrower	Lenore Coughlin

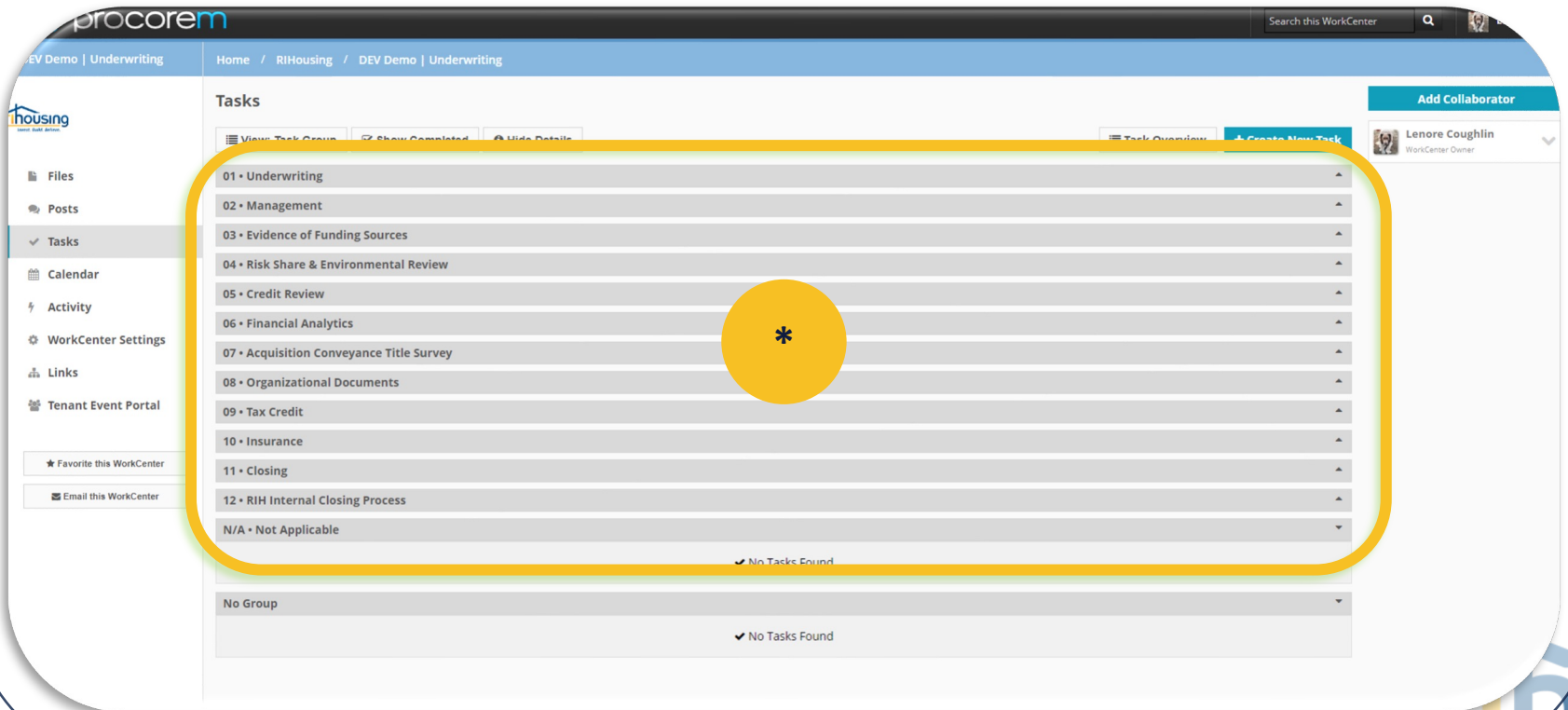




## Task Grouping



Tasks Groups are collapsible. Click on a heading to collapse the tasks beneath.



The screenshot displays the Procorem interface for a 'DEV Demo | Underwriting' project. The 'Tasks' section is visible, showing a list of task groups. A yellow box highlights the list, and a yellow circle with an asterisk is placed over the list items. The task groups are:

- 01 • Underwriting
- 02 • Management
- 03 • Evidence of Funding Sources
- 04 • Risk Share & Environmental Review
- 05 • Credit Review
- 06 • Financial Analytics
- 07 • Acquisition Conveyance Title Survey
- 08 • Organizational Documents
- 09 • Tax Credit
- 10 • Insurance
- 11 • Closing
- 12 • RIH Internal Closing Process
- N/A • Not Applicable

Below the list, there are two sections for 'No Tasks Found'.

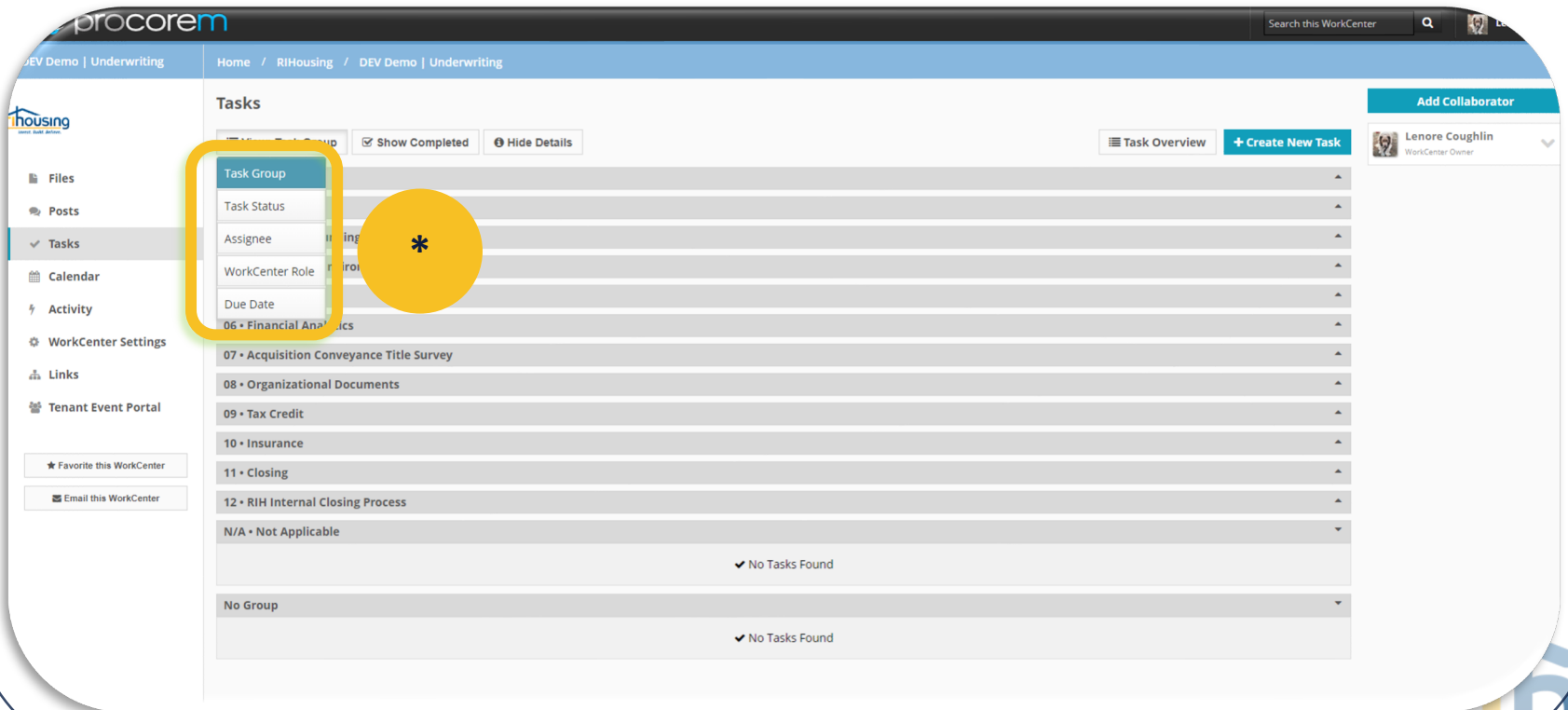




## Task Grouping



Tasks Groups are collapsible. Click on a heading to collapse the tasks beneath.



The screenshot displays the Procorem interface for a WorkCenter. The main content area is titled 'Tasks' and features a list of task groups. A yellow box highlights the 'Task Group' heading, and a yellow circle with an asterisk is placed next to it. The task list includes the following items:

- Task Group
- Task Status
- Assignee
- WorkCenter Role
- Due Date
- 06 • Financial Analytics
- 07 • Acquisition Conveyance Title Survey
- 08 • Organizational Documents
- 09 • Tax Credit
- 10 • Insurance
- 11 • Closing
- 12 • RIH Internal Closing Process
- N/A • Not Applicable
- No Tasks Found
- No Group
- No Tasks Found

The interface also includes a sidebar with navigation options (Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, Tenant Event Portal) and a right-hand panel for adding collaborators (Add Collaborator, Lenore Coughlin, WorkCenter Owner).

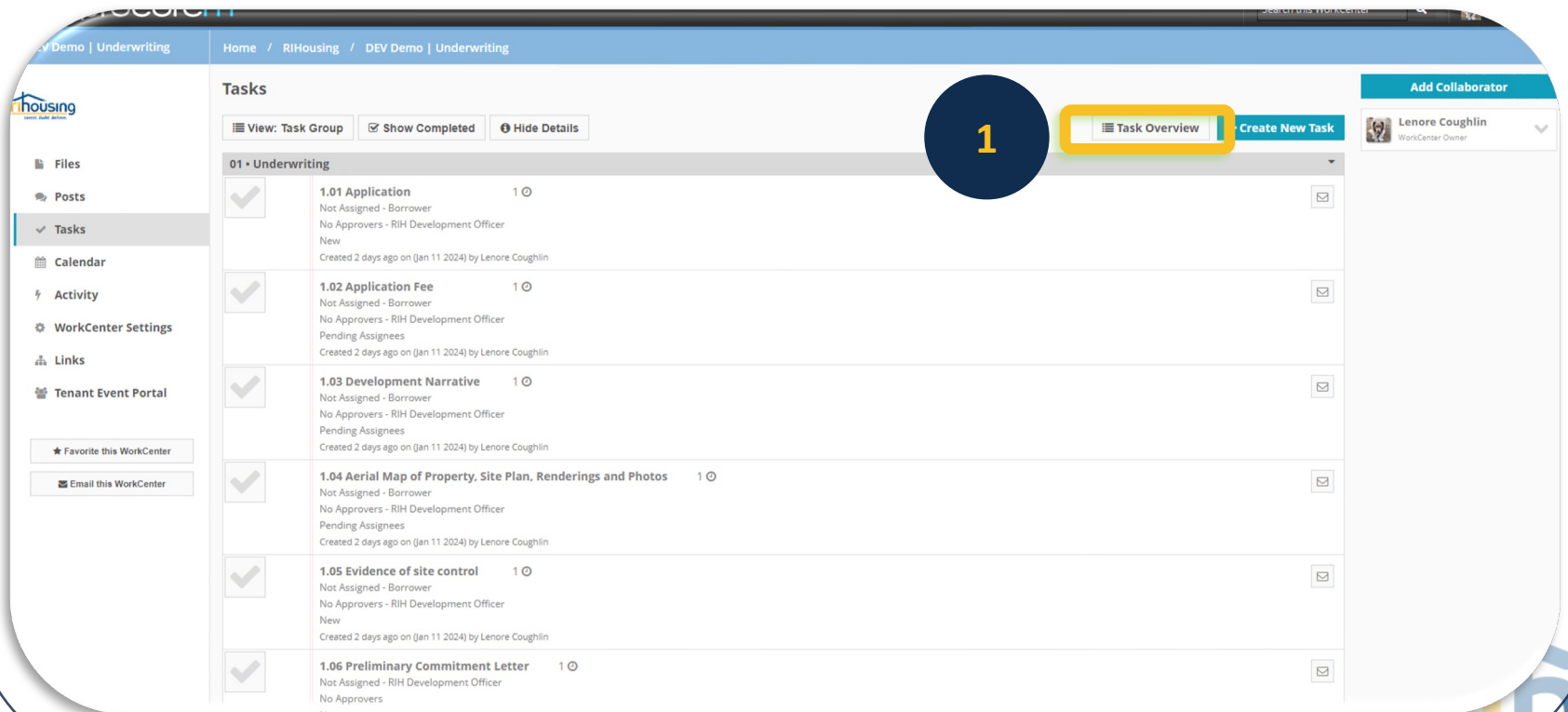




## Task Filtering

1

Select **Task Overview** from atop the Task Groups. A report will open in a new browser window where tasks will be grouped to reflect the **View**.



The screenshot displays the Procorem 'Tasks' interface. At the top, there are navigation links: 'Home / RIHousing / DEV Demo | Underwriting'. Below this, the 'Tasks' section is active, showing a list of tasks under the group '01 • Underwriting'. The tasks are:

- 1.01 Application (1 icon)
- 1.02 Application Fee (1 icon)
- 1.03 Development Narrative (1 icon)
- 1.04 Aerial Map of Property, Site Plan, Renderings and Photos (1 icon)
- 1.05 Evidence of site control (1 icon)
- 1.06 Preliminary Commitment Letter (1 icon)

Each task entry includes details such as 'Not Assigned - Borrower', 'No Approvers - RIH Development Officer', and 'Created 2 days ago on (Jan 11 2024) by Lenore Coughlin'. A 'Task Overview' button is highlighted with a yellow box and a blue circle containing the number '1'. Other buttons include 'View: Task Group', 'Show Completed', 'Hide Details', and 'Create New Task'. A sidebar on the left contains navigation options like 'Files', 'Posts', 'Tasks', 'Calendar', 'Activity', 'WorkCenter Settings', 'Links', and 'Tenant Event Portal'. A right sidebar shows 'Add Collaborator' with 'Lenore Coughlin' as the selected user.



## Task Filtering

2

Use the filters available to work with the tasks in the webpage. Export to Excel (preferred) or PDF if desired.

Task Overview for DEV Demo | Underwriting

Export to Excel Export to PDF

Task Group

Task	Phase	Status	Task Group	Associated Roles	Most Recent Upload	Most Recent Comment
Task Group: 01 • Underwriting						
1.01 Application		New	01 • Underwriting	Borrower, RIH Development Officer		
1.02 Application Fee		Pending Assignees	01 • Underwriting	Borrower, RIH Development Officer		
1.03 Development Narrative		Pending Assignees	01 • Underwriting	Borrower, RIH Development Officer		
1.04 Aerial Map of Property, Site Plan, Renderings and Photos		Pending Assignees	01 • Underwriting	Borrower, RIH Development Officer		
1.05 Evidence of site control		New	01 • Underwriting	Borrower, RIH Development Officer		
1.06 Preliminary Commitment Letter		New	01 • Underwriting	RIH Development Officer		
1.07 RIHousing Appraisal RFQ		Pending Assignees	01 • Underwriting	RIH Development Officer		
1.08 RIHousing Commissioned Appraisal		Pending Assignees	01 • Underwriting	RIH Development Officer		
1.09 RIHousing Commissioned Market Study		Pending Assignees	01 • Underwriting	RIH Development Officer		
1.10 Firm Approval for Credit						

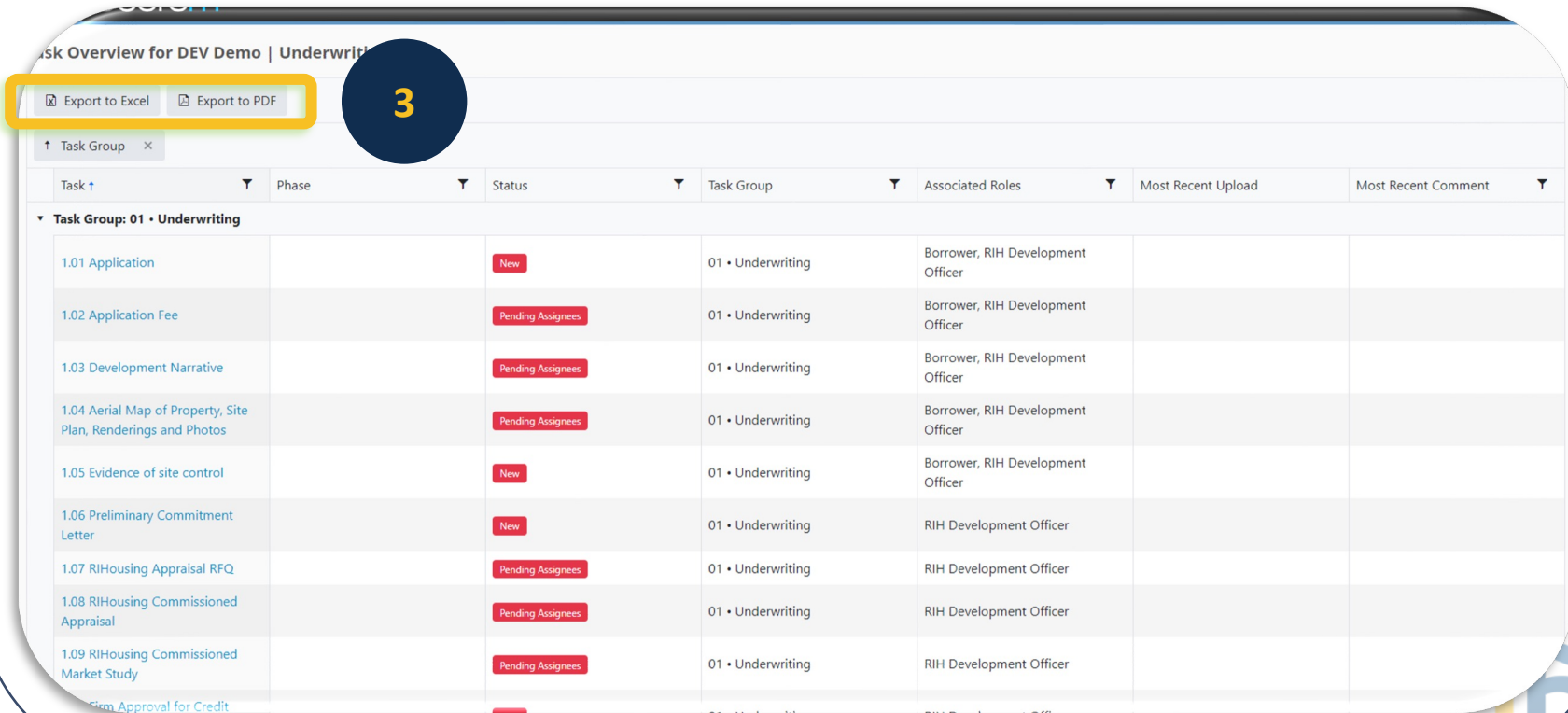




## Task Filtering

3

Export to Excel (preferred) or PDF if desired.



The screenshot shows a 'Task Overview for DEV Demo | Underwriting' page. A yellow box highlights the 'Export to Excel' and 'Export to PDF' buttons. A blue circle with the number '3' is placed over the 'Export to PDF' button. Below the buttons is a table with columns: Task, Phase, Status, Task Group, Associated Roles, Most Recent Upload, and Most Recent Comment. The table is filtered to show tasks under the '01 • Underwriting' group.

Task	Phase	Status	Task Group	Associated Roles	Most Recent Upload	Most Recent Comment
▼ Task Group: 01 • Underwriting						
1.01 Application		New	01 • Underwriting	Borrower, RIH Development Officer		
1.02 Application Fee		Pending Assignees	01 • Underwriting	Borrower, RIH Development Officer		
1.03 Development Narrative		Pending Assignees	01 • Underwriting	Borrower, RIH Development Officer		
1.04 Aerial Map of Property, Site Plan, Renderings and Photos		Pending Assignees	01 • Underwriting	Borrower, RIH Development Officer		
1.05 Evidence of site control		New	01 • Underwriting	Borrower, RIH Development Officer		
1.06 Preliminary Commitment Letter		New	01 • Underwriting	RIH Development Officer		
1.07 RIHousing Appraisal RFQ		Pending Assignees	01 • Underwriting	RIH Development Officer		
1.08 RIHousing Commissioned Appraisal		Pending Assignees	01 • Underwriting	RIH Development Officer		
1.09 RIHousing Commissioned Market Study		Pending Assignees	01 • Underwriting	RIH Development Officer		
1.10 Firm Approval for Credit						

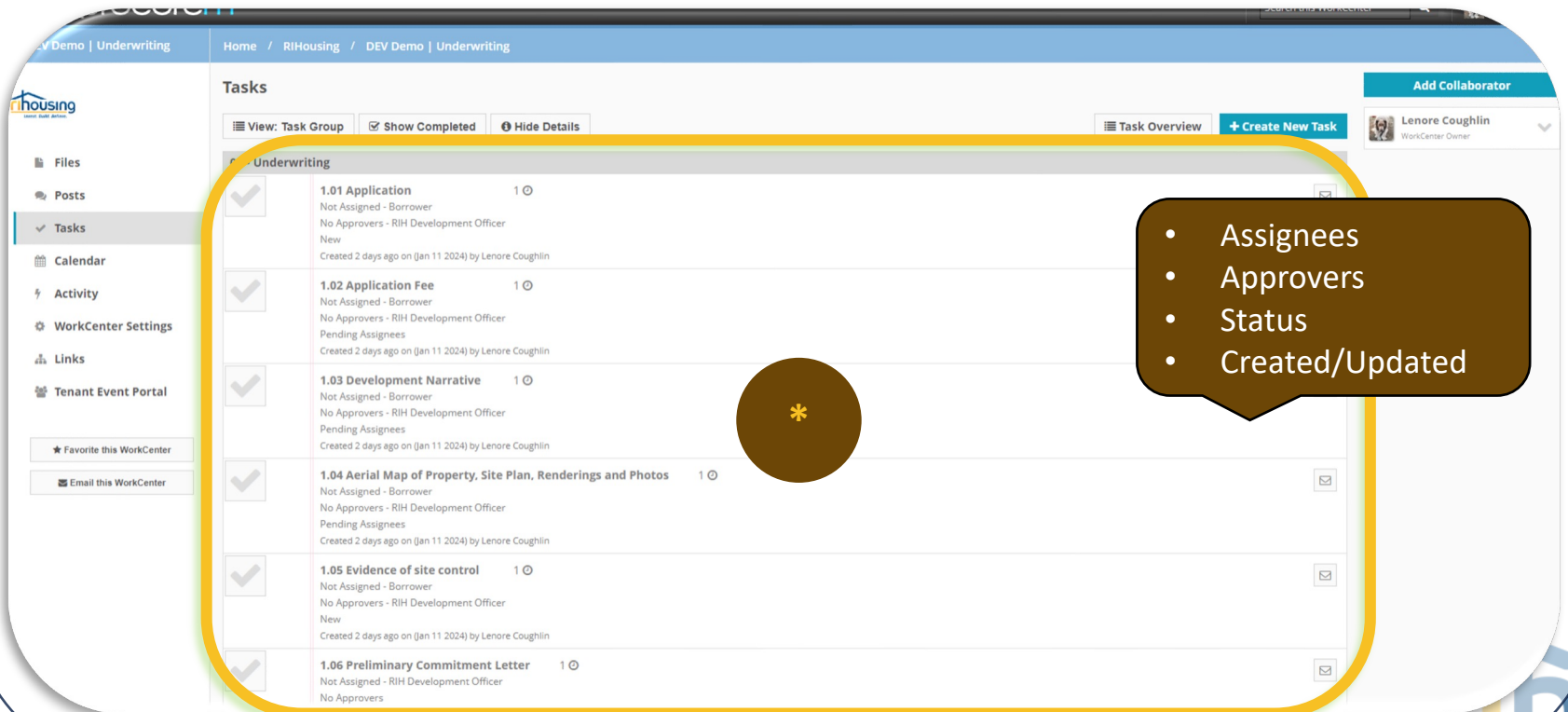




## Task Details



Some task details can be seen on the Tasks page.

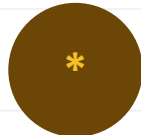


The screenshot displays the 'Tasks' page in the Procorem application. The page title is 'Tasks' and the breadcrumb navigation is 'Home / RIHousing / DEV Demo | Underwriting'. The left sidebar shows navigation options: Files, Posts, Tasks (selected), Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area shows a list of tasks under the 'Underwriting' category. The tasks are:

Task ID	Task Name	Status	Created/Updated
1.01	Application	Not Assigned - Borrower	Created 2 days ago on (Jan 11 2024) by Lenore Coughlin
1.02	Application Fee	Not Assigned - Borrower	Created 2 days ago on (Jan 11 2024) by Lenore Coughlin
1.03	Development Narrative	Not Assigned - Borrower	Created 2 days ago on (Jan 11 2024) by Lenore Coughlin
1.04	Aerial Map of Property, Site Plan, Renderings and Photos	Not Assigned - Borrower	Created 2 days ago on (Jan 11 2024) by Lenore Coughlin
1.05	Evidence of site control	Not Assigned - Borrower	Created 2 days ago on (Jan 11 2024) by Lenore Coughlin
1.06	Preliminary Commitment Letter	Not Assigned - RIH Development Officer	Created 2 days ago on (Jan 11 2024) by Lenore Coughlin

A yellow callout box highlights the task details, and a brown callout box lists the visible details:

- Assignees
- Approvers
- Status
- Created/Updated



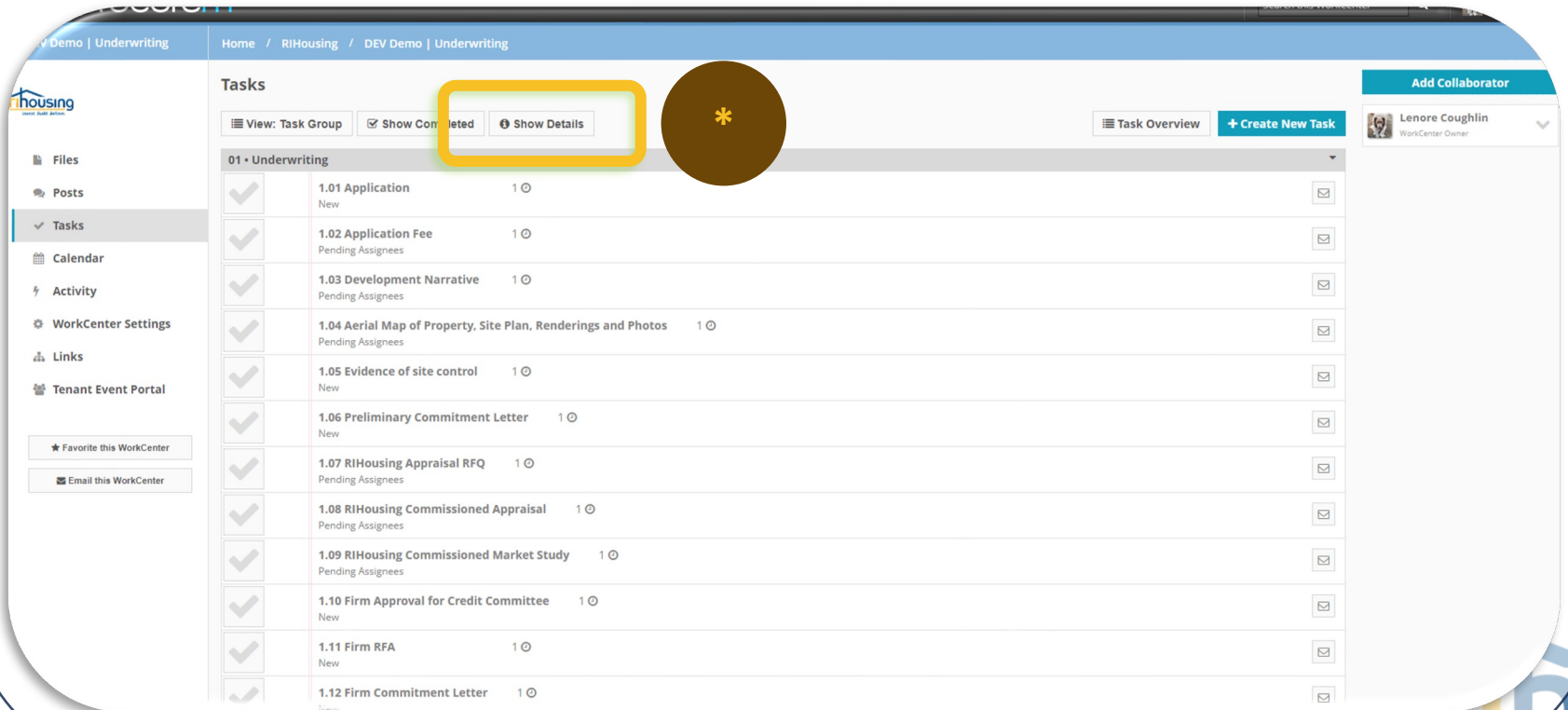
- Assignees
- Approvers
- Status
- Created/Updated



## Task Details



**Hide Details** for a simple, compact list. **Show Details** for more information.



The screenshot displays the Procorem interface for a task list. The top navigation bar includes 'Home / RIHousing / DEV Demo | Underwriting'. The left sidebar contains navigation options: Files, Posts, Tasks (selected), Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area is titled 'Tasks' and features a 'View: Task Group' dropdown, a 'Show Completed' checkbox, and a 'Show Details' button highlighted with a yellow box. A yellow asterisk icon is placed over the 'Show Details' button. Below the navigation, a list of tasks is shown under the heading '01 • Underwriting'. Each task entry includes a checkbox, a task title, a status (e.g., 'New' or 'Pending Assignees'), a count (e.g., '1'), and an email icon.

Task ID	Task Title	Status	Count	Action
1.01	Application New	New	1	Email
1.02	Application Fee	Pending Assignees	1	Email
1.03	Development Narrative	Pending Assignees	1	Email
1.04	Aerial Map of Property, Site Plan, Renderings and Photos	Pending Assignees	1	Email
1.05	Evidence of site control	New	1	Email
1.06	Preliminary Commitment Letter	New	1	Email
1.07	RIHousing Appraisal RFQ	Pending Assignees	1	Email
1.08	RIHousing Commissioned Appraisal	Pending Assignees	1	Email
1.09	RIHousing Commissioned Market Study	Pending Assignees	1	Email
1.10	Firm Approval for Credit Committee	New	1	Email
1.11	Firm RFA	New	1	Email
1.12	Firm Commitment Letter	New	1	Email



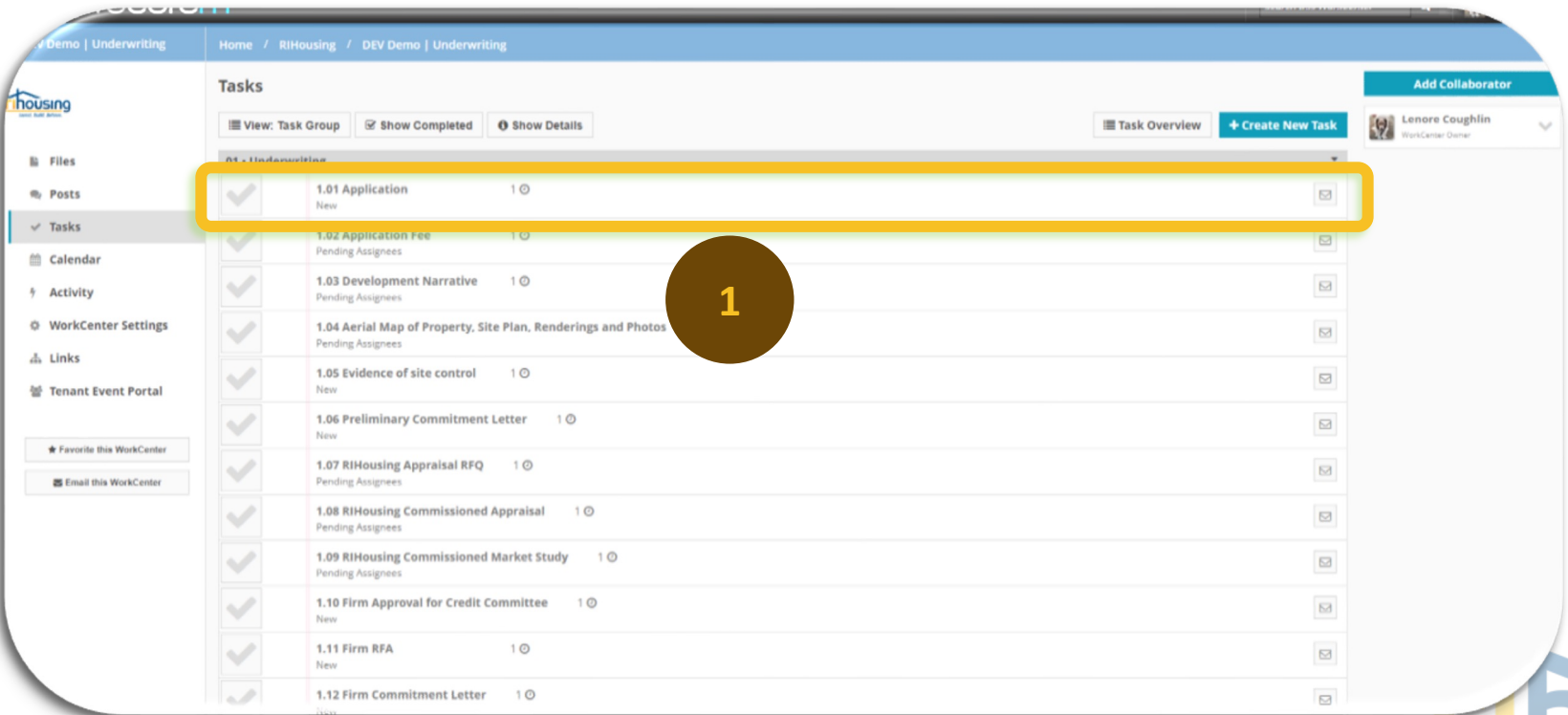




## Task Details

1

Click on a task to see the Task Details screen.



The screenshot shows the Procorem interface with a list of tasks. A yellow box highlights the first task, '1.01 Application', which is marked as 'New'. A brown circle with the number '1' is placed over the task list, indicating the click action.

Task ID	Task Name	Status	Count	Icon
1.01	Application	New	1	📧
1.02	Application Fee	Pending Assignees	1	📧
1.03	Development Narrative	Pending Assignees	1	📧
1.04	Aerial Map of Property, Site Plan, Renderings and Photos	Pending Assignees	1	📧
1.05	Evidence of site control	New	1	📧
1.06	Preliminary Commitment Letter	New	1	📧
1.07	RIHousing Appraisal RFQ	Pending Assignees	1	📧
1.08	RIHousing Commissioned Appraisal	Pending Assignees	1	📧
1.09	RIHousing Commissioned Market Study	Pending Assignees	1	📧
1.10	Firm Approval for Credit Committee	New	1	📧
1.11	Firm RFA	New	1	📧
1.12	Firm Commitment Letter	New	1	📧

1

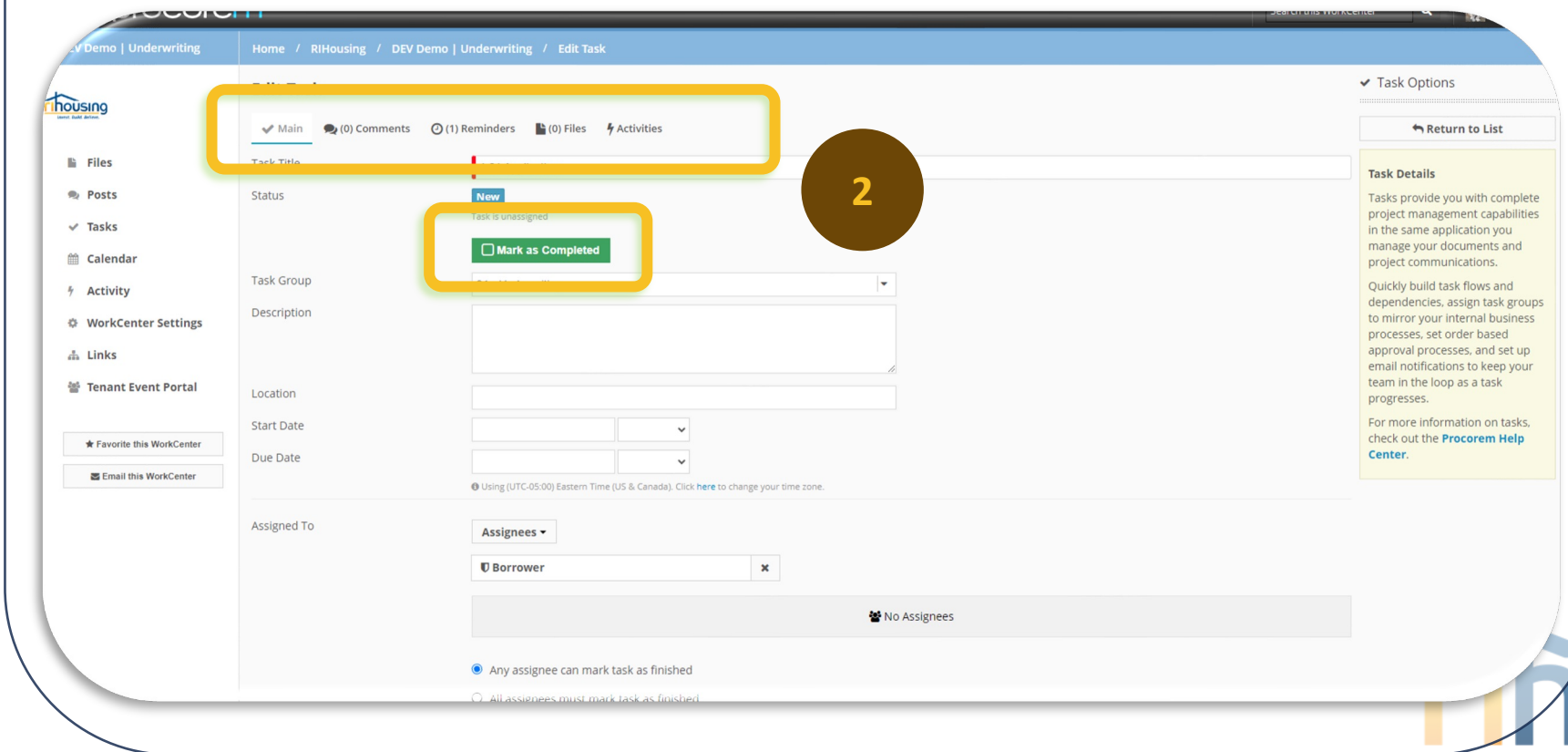




## Task Details

2

Complete the task or add Comments and Files as applicable.



The screenshot shows the 'Task Details' page in Procorem. A yellow box highlights the top navigation bar containing 'Main', '(0) Comments', '(1) Reminders', '(0) Files', and 'Activities'. A green box highlights the 'Mark as Completed' button. A brown circle with the number '2' is placed over the 'Task Title' input field. The page includes a sidebar with navigation options like 'Files', 'Posts', 'Tasks', 'Calendar', 'Activity', 'WorkCenter Settings', 'Links', and 'Tenant Event Portal'. The main content area has fields for 'Task Title', 'Status' (with a 'New' button), 'Task Group', 'Description', 'Location', 'Start Date', 'Due Date', and 'Assigned To' (with an 'Assignees' dropdown and a search box containing 'Borrower'). A 'Task Options' sidebar on the right contains a 'Return to List' button and a 'Task Details' section with explanatory text and a link to the 'Procorem Help Center'. At the bottom, there are radio buttons for 'Any assignee can mark task as finished' (selected) and 'All assignees must mark task as finished'.

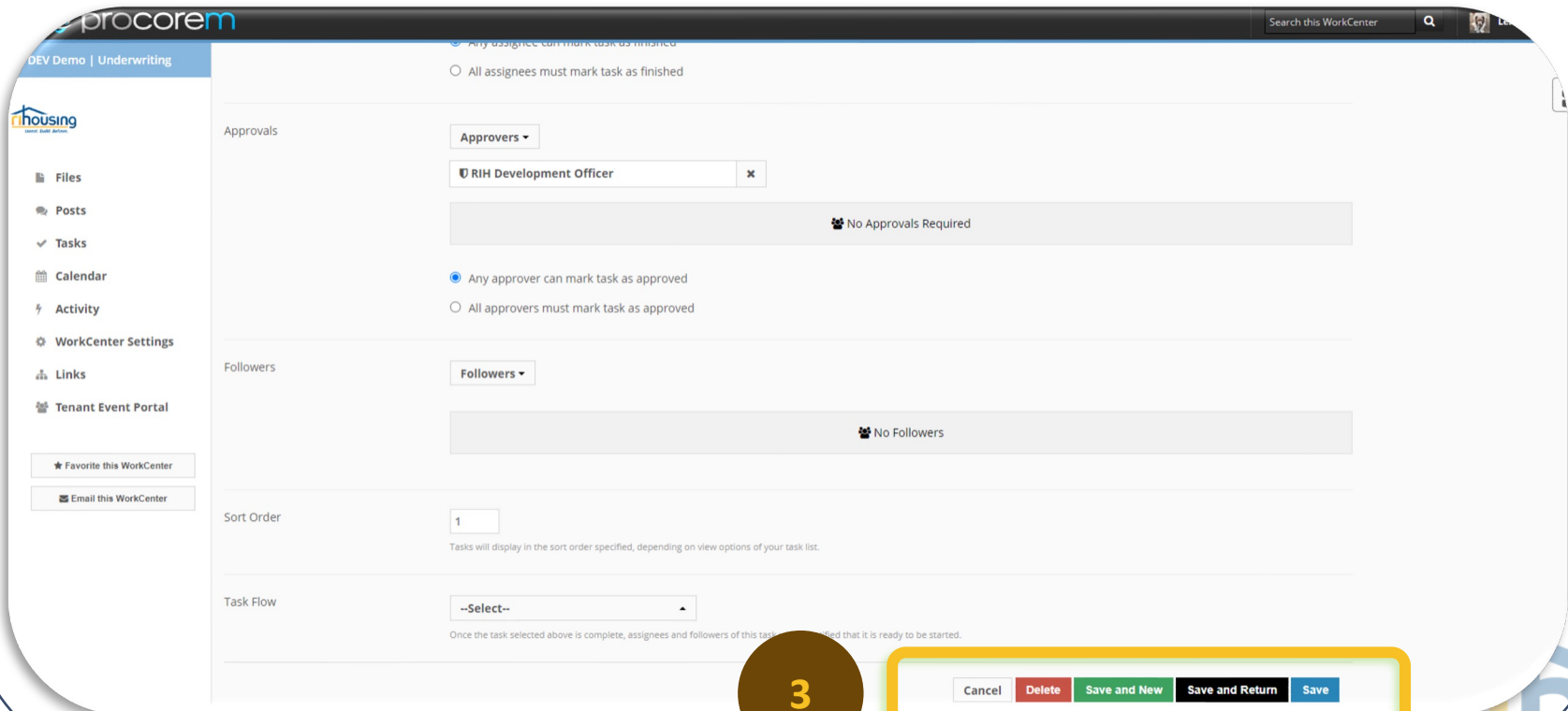




## Task Details

3

Select **Cancel** if you've taken no action but return to the task list. **Save and Return** will save your progress and go back to the task list.



The screenshot shows the Procorem interface for task details. The left sidebar includes navigation options like Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area has sections for Approvals, Followers, Sort Order, and Task Flow. The Approvals section shows a dropdown for 'Approvers' with 'RIH Development Officer' selected. The Followers section shows a dropdown for 'Followers' with 'No Followers' displayed. The Sort Order section has a text input with '1'. The Task Flow section has a dropdown with '--Select--'. At the bottom right, a yellow box highlights the action buttons: Cancel, Delete, Save and New, Save and Return, and Save. A large number '3' is overlaid on the bottom center of the screenshot.

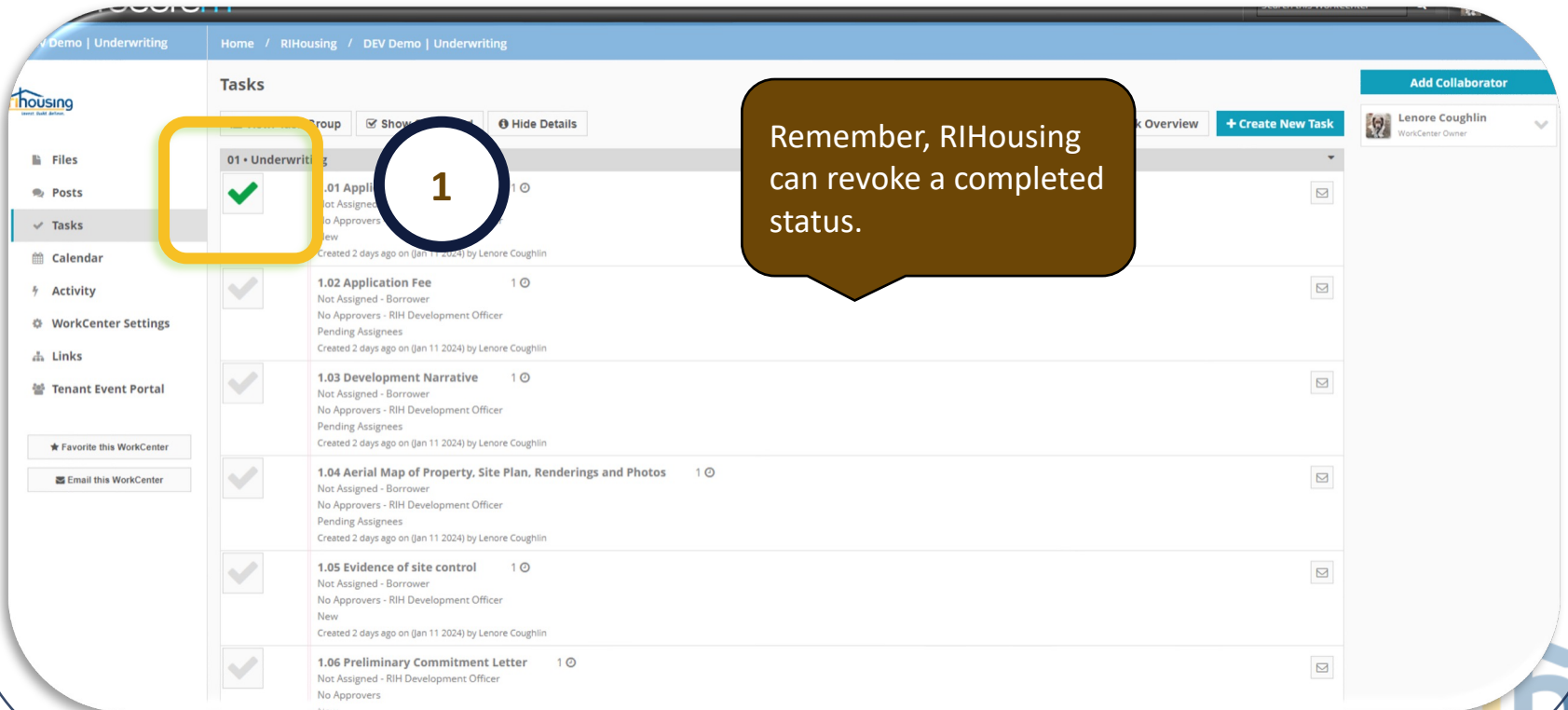
3



## Completing Tasks | Option 1

1

Click on the empty check box to turn the icon green; this indicates that the task has been completed.



The screenshot displays the 'Tasks' section of the RIHousing application. The interface includes a left sidebar with navigation options like 'Files', 'Posts', 'Tasks', 'Calendar', 'Activity', 'WorkCenter Settings', 'Links', and 'Tenant Event Portal'. The main area shows a list of tasks under the heading '01 - Underwriting'. The first task, '1.01 Application Fee', has a green checkmark in its status column, which is highlighted by a yellow box. A blue circle with the number '1' is placed over the checkmark. Below the screenshot, a brown speech bubble contains the text: 'Remember, RIHousing can revoke a completed status.'

Task ID	Task Name	Status	Created By
1.01	Application Fee	Completed (Green Checkmark)	Lenore Coughlin
1.02	Application Fee	Not Assigned - Borrower	Lenore Coughlin
1.03	Development Narrative	Not Assigned - Borrower	Lenore Coughlin
1.04	Aerial Map of Property, Site Plan, Renderings and Photos	Not Assigned - Borrower	Lenore Coughlin
1.05	Evidence of site control	Not Assigned - Borrower	Lenore Coughlin
1.06	Preliminary Commitment Letter	Not Assigned - RIH Development Officer	Lenore Coughlin

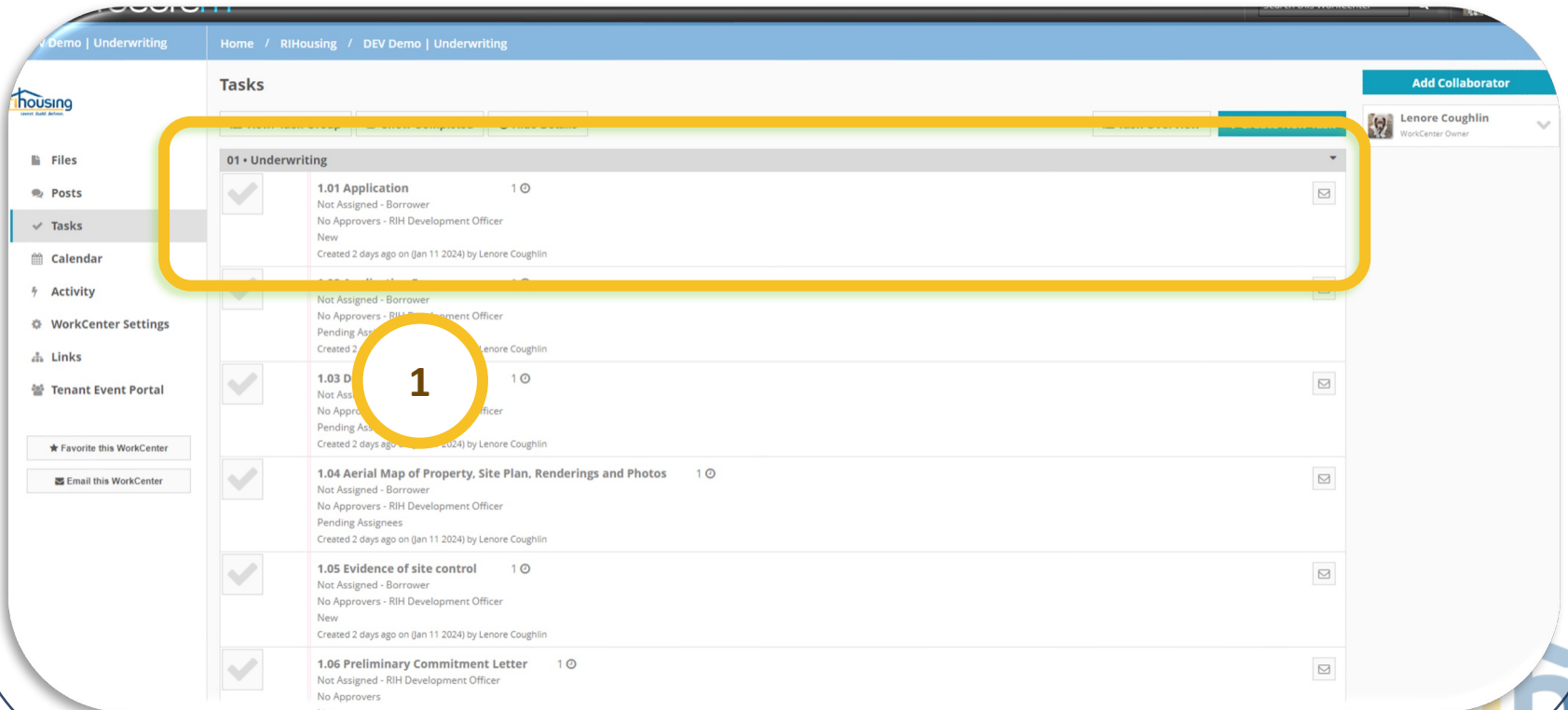




## Completing Tasks | Option 2

1

Click on the task to be completed to open the Task Details screen



The screenshot shows the Procorem interface with a list of tasks. A yellow box highlights the first task, '1.01 Application', and a yellow circle with the number '1' is placed over the task title. The task details are as follows:

Task ID	Task Title	Count
1.01	Application	1
1.03	D...	1
1.04	Aerial Map of Property, Site Plan, Renderings and Photos	1
1.05	Evidence of site control	1
1.06	Preliminary Commitment Letter	1

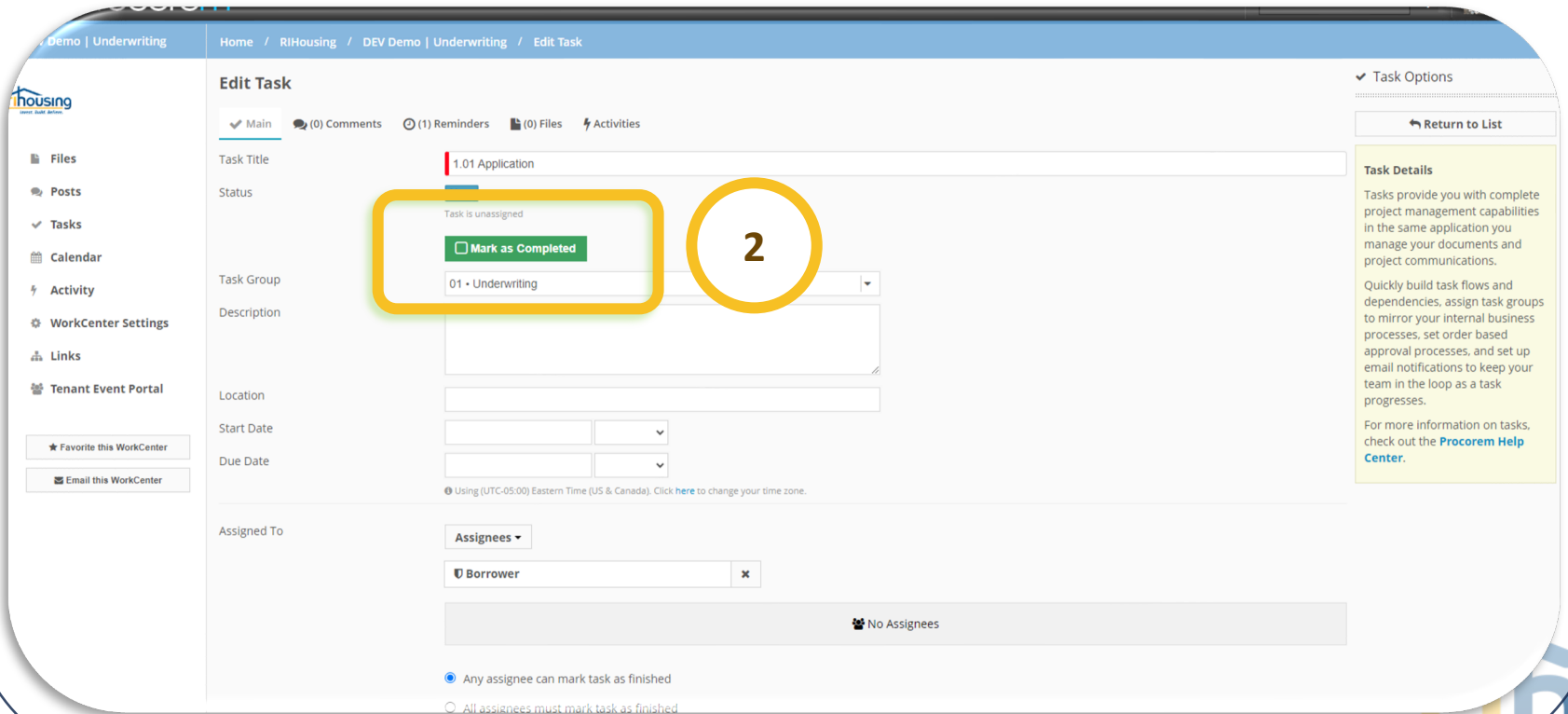




## Completing Tasks | Option 2

2

Click **Mark as Completed**.



**Edit Task**

Home / RIHousing / DEV Demo | Underwriting / Edit Task

Task Title: 1.01 Application

Status: Task is unassigned

**Mark as Completed**

Task Group: 01 • Underwriting

Assigned To: Assignees

Borrower

No Assignees

Any assignee can mark task as finished

All assignees must mark task as finished

**Task Options**

[Return to List](#)

**Task Details**

Tasks provide you with complete project management capabilities in the same application you manage your documents and project communications.

Quickly build task flows and dependencies, assign task groups to mirror your internal business processes, set order based approval processes, and set up email notifications to keep your team in the loop as a task progresses.

For more information on tasks, check out the [Procorem Help Center](#).



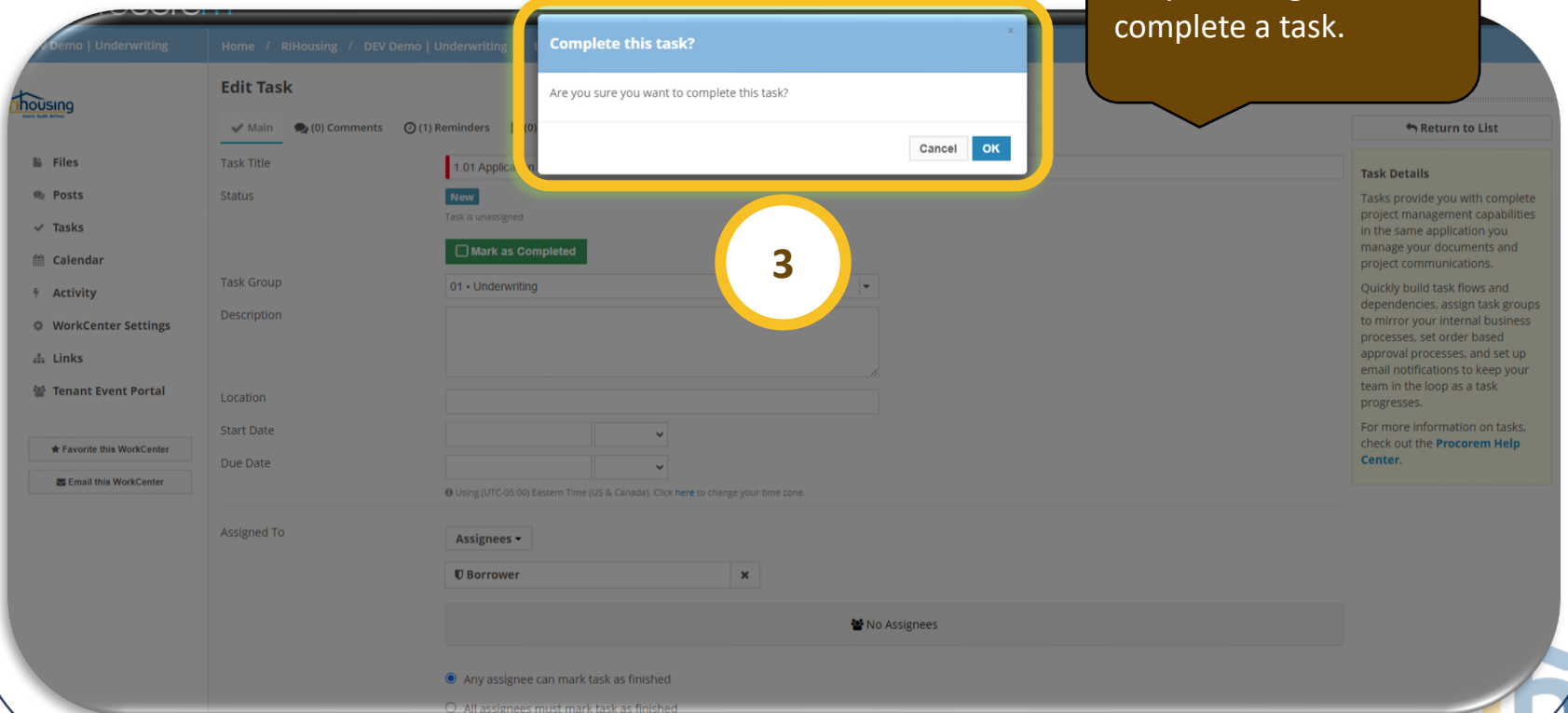


## Completing Tasks | Option 2

3

Click OK.

Only an Assignee can complete a task.



**Complete this task?**

Are you sure you want to complete this task?

Cancel OK

**3**

**3**

**Mark as Completed**

01 - Underwriting

Assigned To: Borrower

No Assignees

Any assignee can mark task as finished

All assignees must mark task as finished

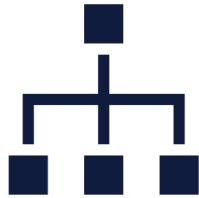
**Task Details**

Tasks provide you with complete project management capabilities in the same application you manage your documents and project communications.

Quickly build task flows and dependencies, assign task groups to mirror your internal business processes, set order based approval processes, and set up email notifications to keep your team in the loop as a task progresses.

For more information on tasks, check out the [Procorem Help Center](#).





# Links



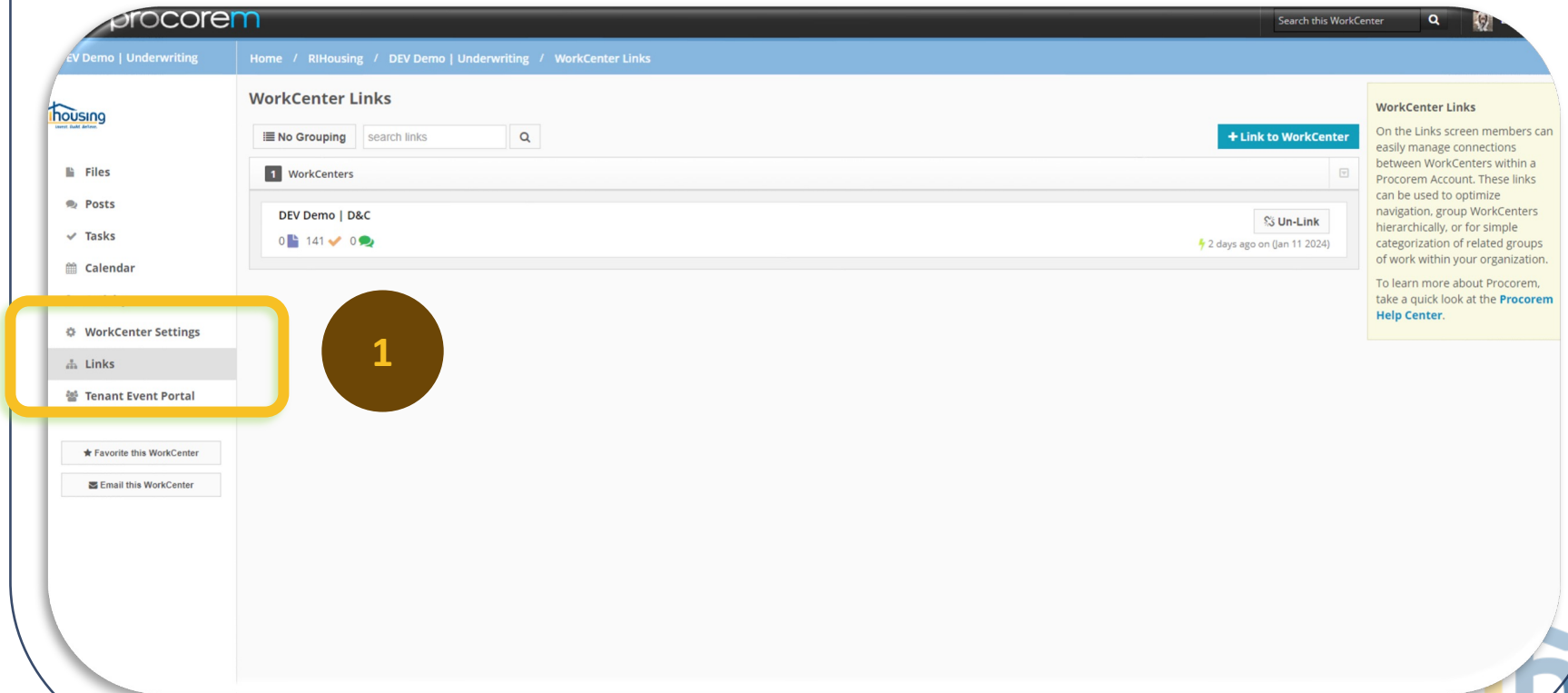




# Links

1

Some workcenters have links to other workcenters built in. Select the **Links** option from the left menu.



The screenshot shows the Procorem WorkCenter interface. The left sidebar contains a menu with 'WorkCenter Settings', 'Links', and 'Tenant Event Portal'. The 'Links' option is highlighted with a yellow box and a large '1' in a brown circle. The main content area is titled 'WorkCenter Links' and shows a list of linked workcenters. One link is visible: 'DEV Demo | D&C' with 0 files, 141 likes, and 0 comments. A '+ Link to WorkCenter' button is in the top right, and an 'Un-Link' button is next to the listed link. A help box on the right explains the 'WorkCenter Links' feature.

**WorkCenter Links**

On the Links screen members can easily manage connections between WorkCenters within a Procorem Account. These links can be used to optimize navigation, group WorkCenters hierarchically, or for simple categorization of related groups of work within your organization.

To learn more about Procorem, take a quick look at the [Procorem Help Center](#).

1

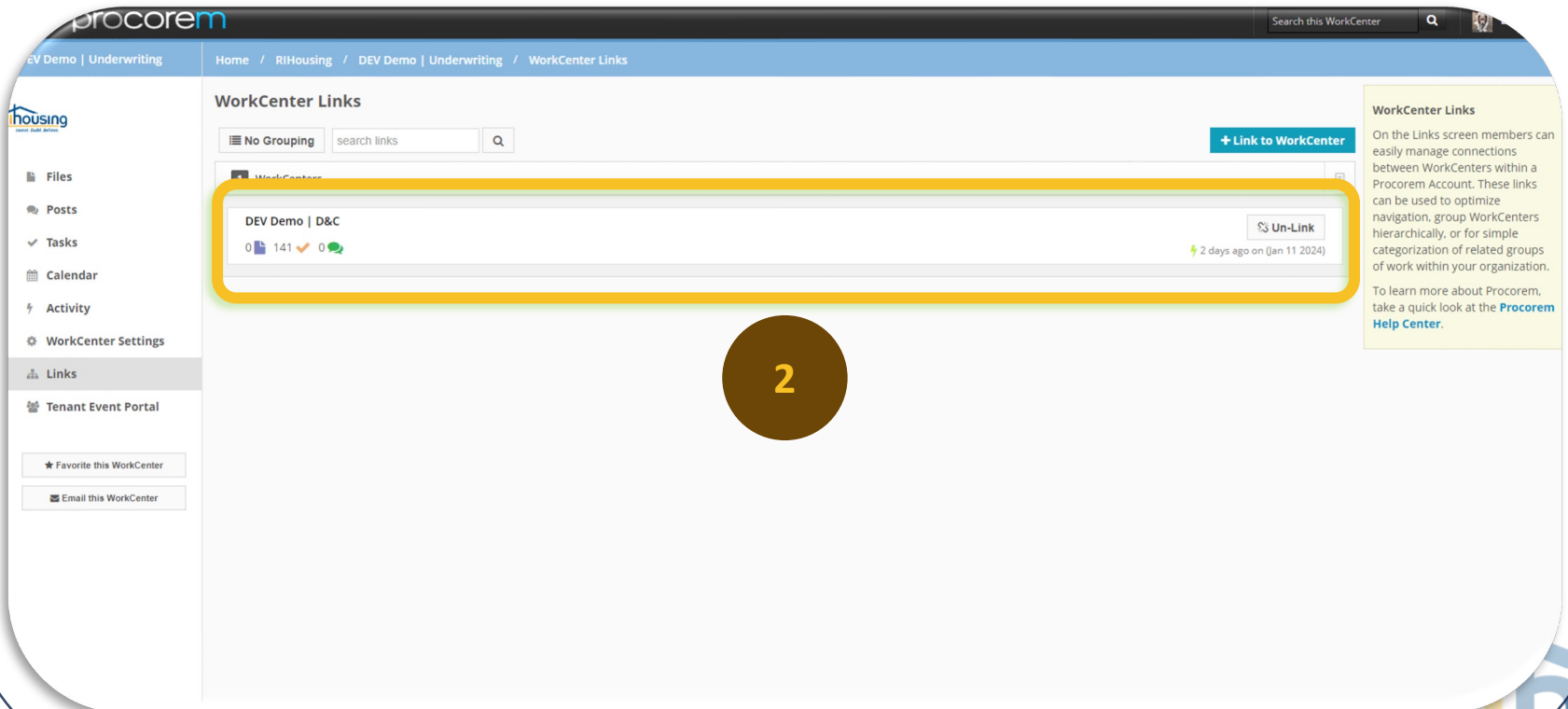




## Links

2

If the list is blank, there are no links. If links exist, they will be displayed in a list format below. Click to navigate to another workcenter.



The screenshot shows the Procorem WorkCenter Links interface. The breadcrumb trail is: Home / RIHousing / DEV Demo | Underwriting / WorkCenter Links. The page title is "WorkCenter Links". There is a search bar with "No Grouping" and "search links" options. A blue button labeled "+ Link to WorkCenter" is in the top right. A list of links is shown, with one link highlighted by a yellow box: "DEV Demo | D&C" with 0 files, 141 likes, and 0 comments, last updated 2 days ago (Jan 11 2024). An "Un-Link" button is next to it. A sidebar on the left contains navigation options: Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links (selected), and Tenant Event Portal. At the bottom of the sidebar are buttons for "Favorite this WorkCenter" and "Email this WorkCenter". A yellow circle with the number "2" is overlaid on the link list. A help box on the right explains the "WorkCenter Links" feature.

**WorkCenter Links**

On the Links screen members can easily manage connections between WorkCenters within a Procorem Account. These links can be used to optimize navigation, group WorkCenters hierarchically, or for simple categorization of related groups of work within your organization.

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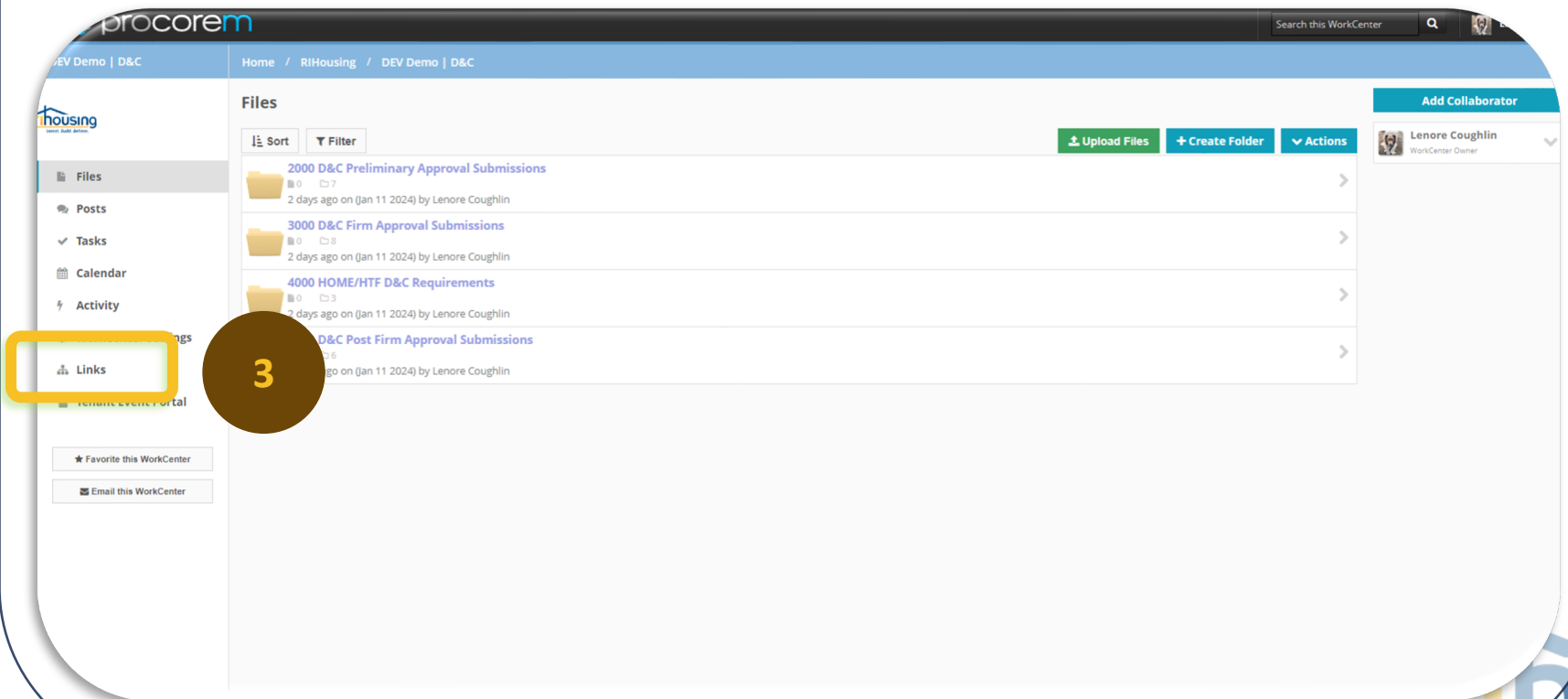
2



## Links

3

Return to the previous workcenter by accessing Links. Repeat steps 1-2.



The screenshot displays the Procorem web application interface. The top navigation bar includes the Procorem logo, a search bar labeled "Search this WorkCenter", and a user profile icon. The breadcrumb trail shows "Home / RIHousing / DEV Demo | D&C". The left sidebar contains a navigation menu with items: Files, Posts, Tasks, Calendar, Activity, and Links. The "Links" item is highlighted with a yellow rectangular box. A large, semi-transparent brown circle with the number "3" is overlaid on the "Links" menu item. The main content area is titled "Files" and lists several folders: "2000 D&C Preliminary Approval Submissions", "3000 D&C Firm Approval Submissions", "4000 HOME/HTF D&C Requirements", and "D&C Post Firm Approval Submissions". Each folder entry includes a folder icon, a count, a timestamp, and the user name "Lenore Coughlin". The right sidebar shows the "Add Collaborator" section with a dropdown menu currently displaying "Lenore Coughlin, WorkCenter Owner". At the bottom of the interface, there are buttons for "Favorite this WorkCenter" and "Email this WorkCenter".

3



# Tenant Event Portal

## Adding Tenant Events

The Tenant Event Portal offers two ways to enter tenant events.

### XML Import

Properties with Property Management Software that provides the capability to generate a NAHMA Unit Status report can import all events for the compliance period (or year-to-date) using the XML Import Function.

 Import Tenant Events

### Manual Entry

Owner/agents can enter tenant events manually for the compliance period.

 Add Tenant Event

*The pale-yellow sections throughout the portal provide much of the information we're discussing and are worth reviewing if you have questions while importing tenant events.*



## Adding Tenant Events

RIHousing requires tenant event updates by the 10<sup>th</sup> of each month.

### XML Import

- Generate the year-to-date XML file from property management software
- Upload the year-to-date XML file into the Tenant Event Portal
  - Yes, upload a file even if there were no changes to tenant events.
- Mark associated Tasks as Complete

### Manual Entry

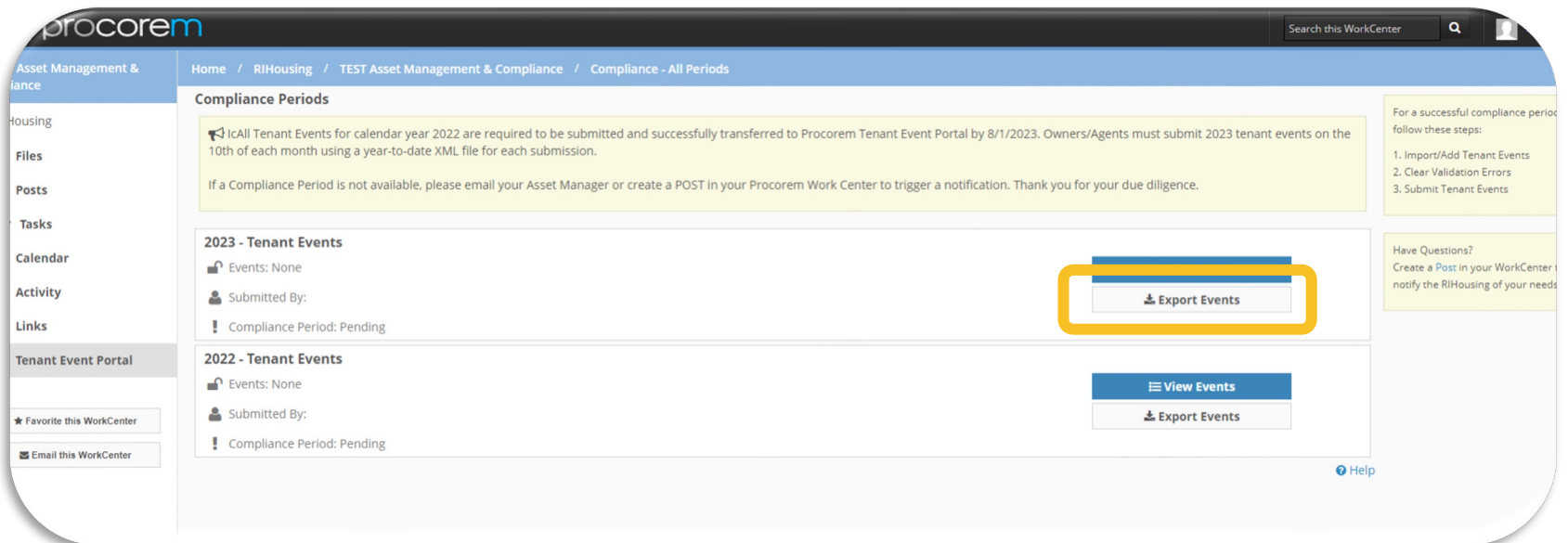
- Enter all tenant events that have taken place since the last update.
- Mark associated Tasks as Complete
- If there were no changes since the last upload, use the Comment option in the Tasks to communicate with your Asset Manager

*The pale-yellow sections throughout the portal provide much of the information we're discussing and are worth reviewing if you have questions while importing tenant events.*



## Occupancy Report

Generate an occupancy report using tenant event data in Procorem by selecting the **Export Events** button for a given year.



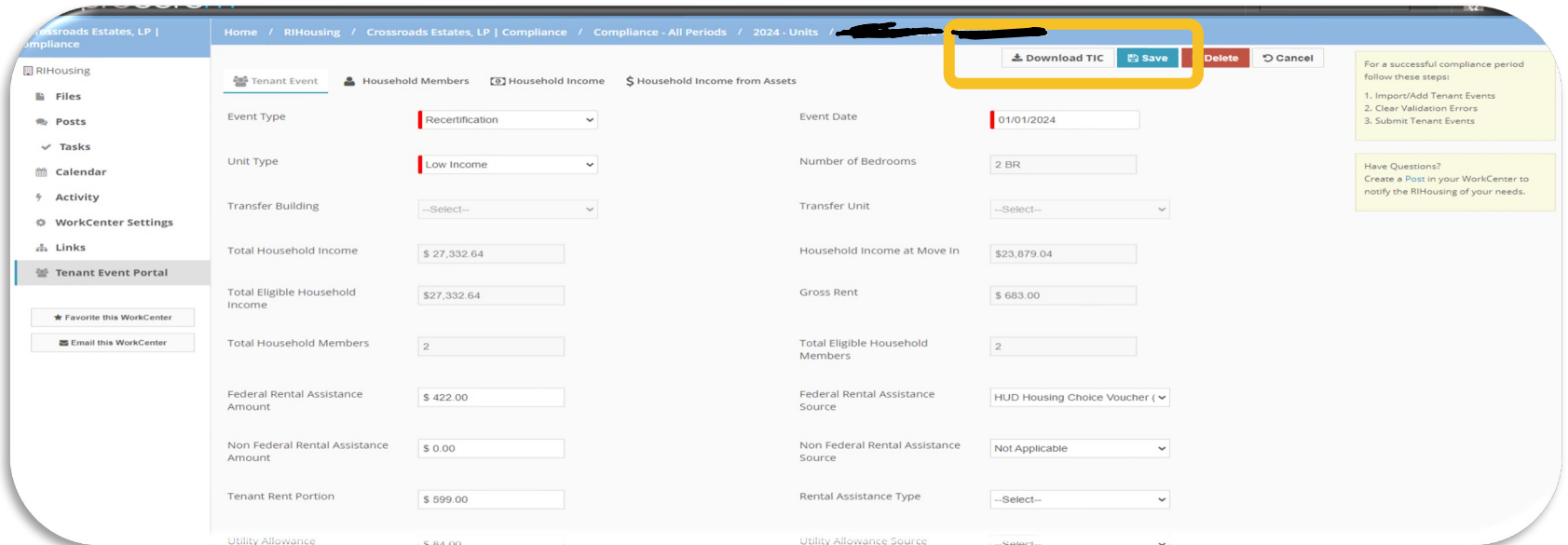
The screenshot shows the Procorem Tenant Event Portal interface. The breadcrumb navigation is: Home / RI Housing / TEST Asset Management & Compliance / Compliance - All Periods. The main content area is titled "Compliance Periods" and contains a yellow notification box with the following text: "ICAll Tenant Events for calendar year 2022 are required to be submitted and successfully transferred to Procorem Tenant Event Portal by 8/1/2023. Owners/Agents must submit 2023 tenant events on the 10th of each month using a year-to-date XML file for each submission. If a Compliance Period is not available, please email your Asset Manager or create a POST in your Procorem Work Center to trigger a notification. Thank you for your due diligence." Below this, there are two sections for tenant events: "2023 - Tenant Events" and "2022 - Tenant Events". Each section shows "Events: None", "Submitted By:", and "Compliance Period: Pending". In the 2023 section, the "Export Events" button is highlighted with a yellow box. In the 2022 section, the "View Events" and "Export Events" buttons are visible. On the right side, there are two yellow boxes: one with steps for a successful compliance period (1. Import/Add Tenant Events, 2. Clear Validation Errors, 3. Submit Tenant Events) and another with a "Have Questions?" section (Create a Post in your WorkCenter to notify the RI Housing of your needs). The bottom right corner has a "Help" link.

*Property Name • BuildingName • Unit # • # of Bedrooms • Unit Type • Program(s) • HOME Unit Type • Event Type • Event Date • Transfer To Building • Transfer To Unit • Total Household Members • Head of Household • Student Status • Full Time Student Exceptions • Total Household Income • Gross Rent • Tenant Rent Portion • Utility Allowance • Federal Rental Assistance Amount • Federal Rental Assistance Source • Non Federal Rental Assistance Amount • Non Federal Rental Assistance Source • Special Needs • Most Restrictive Income Designation • Most Restrictive Rent Designation*



## Printing the TIC

An exciting release is available to LIHTC certifications on or after 1/1/24! The TIC is now printable for LIHTC properties only.



The screenshot displays the Procorem Tenant Event Portal interface. The breadcrumb navigation at the top reads: Home / RIHousing / Crossroads Estates, LP | Compliance / Compliance - All Periods / 2024 - Units. The main content area is titled 'Tenant Event' and includes tabs for 'Household Members', 'Household Income', and 'Household Income from Assets'. A yellow box highlights the 'Download TIC' button, along with 'Save', 'Delete', and 'Cancel' buttons. The form contains the following fields:

Event Type	Recertification	Event Date	01/01/2024
Unit Type	Low Income	Number of Bedrooms	2 BR
Transfer Building	--Select--	Transfer Unit	--Select--
Total Household Income	\$ 27,332.64	Household Income at Move In	\$23,879.04
Total Eligible Household Income	\$27,332.64	Gross Rent	\$ 683.00
Total Household Members	2	Total Eligible Household Members	2
Federal Rental Assistance Amount	\$ 422.00	Federal Rental Assistance Source	HUD Housing Choice Voucher
Non Federal Rental Assistance Amount	\$ 0.00	Non Federal Rental Assistance Source	Not Applicable
Tenant Rent Portion	\$ 599.00	Rental Assistance Type	--Select--
Utility Allowance	\$ 84.00	Utility Allowance Source	--Select--

On the right side of the form, there are two informational boxes:

- For a successful compliance period follow these steps:**
  1. Import/Add Tenant Events
  2. Clear Validation Errors
  3. Submit Tenant Events
- Have Questions?**

Create a Post in your WorkCenter to notify the RIHousing of your needs.



## Monthly Tasks

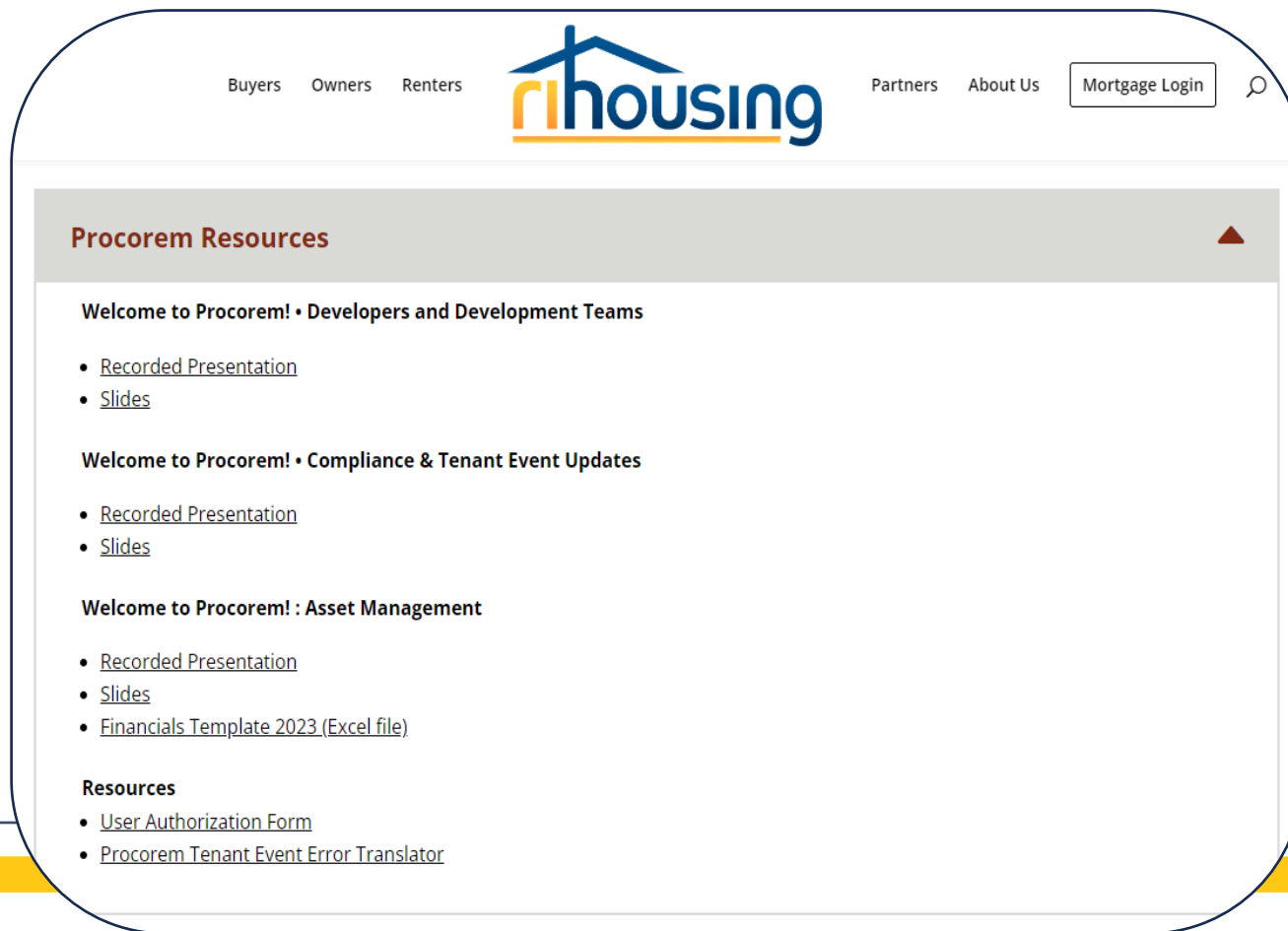
1. Tenant Event Update
2. Validate Tenant Events


## Annual Tasks

1. Final Tenant Event Update
2. Validate Tenant Events for the year
3. Submit Tenant Events

## Procorem Resources

Visit RIHousing's [Training & Opportunities](#) page for recorded training presentations, the corresponding slide decks, and more!

A screenshot of the RIHousing website's Procorem Resources page. The page has a white background with a grey header bar. The navigation menu includes "Buyers", "Owners", "Renters", "Partners", "About Us", and a "Mortgage Login" button. The main content area is titled "Procorem Resources" and is organized into three sections: "Welcome to Procorem! • Developers and Development Teams", "Welcome to Procorem! • Compliance & Tenant Event Updates", and "Welcome to Procorem! : Asset Management". Each section contains a list of links to recorded presentations and slides. A "Resources" section at the bottom lists a "User Authorization Form" and a "Procorem Tenant Event Error Translator".

Buyers Owners Renters  Partners About Us Mortgage Login

### Procorem Resources

**Welcome to Procorem! • Developers and Development Teams**

- [Recorded Presentation](#)
- [Slides](#)

**Welcome to Procorem! • Compliance & Tenant Event Updates**

- [Recorded Presentation](#)
- [Slides](#)

**Welcome to Procorem! : Asset Management**

- [Recorded Presentation](#)
- [Slides](#)
- [Financials Template 2023 \(Excel file\)](#)

**Resources**

- [User Authorization Form](#)
- [Procorem Tenant Event Error Translator](#)

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