



NEAHMA Rhode Island Agency Forum

February 15, 2024



Agenda

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



Staffing Updates

Brittany Toomey, *MF Housing Compliance Manager*

401-429-1455 btoomey@rihousing.com

Richelle FitzGerald, *Senior Program Representative, MF Compliance*

401-457-1227 rfitzgerald@rihousing.com

Charlie Chhum, *Program Representative, MF Compliance*

401-457-1176 cchum@rihousing.com

Kristi Richardson, *Compliance Support Specialist, MF Compliance*

401-450-1307 krichardson@rihousing.com



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 affordable 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 manner and timeframe for the remediation of health and safety deficiencies for three categories of health and safety defects with specific remediation timelines
 - Includes conforming 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



- **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, RIHousing will begin 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



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

(Multiple Units)
Health and Safety Report
NSPIRE



Scheduled: 01/30/2024

Closed:

ID:

Score:

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 cut	Broken window	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 cut	Broken window	2	01/30/24 09:43 BT		Severe	0.64	1.74	24H
Life Threatening: 0/0		Severe: 1/1.74		Outside NSPIRE Totals			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
Life Threatening: 1/7.79		Severe: 0/0		Inside NSPIRE Totals			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
Life Threatening: 1/7.79		Severe: 0/0		Inside NSPIRE Totals			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 or search for "HUD NSPIRE"
found on HUD.gov





HOTMA

Housing Opportunity Through Modernization Act of 2016 (HOTMA)

THIS IS NOT A TRAINING



Effected 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
- 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

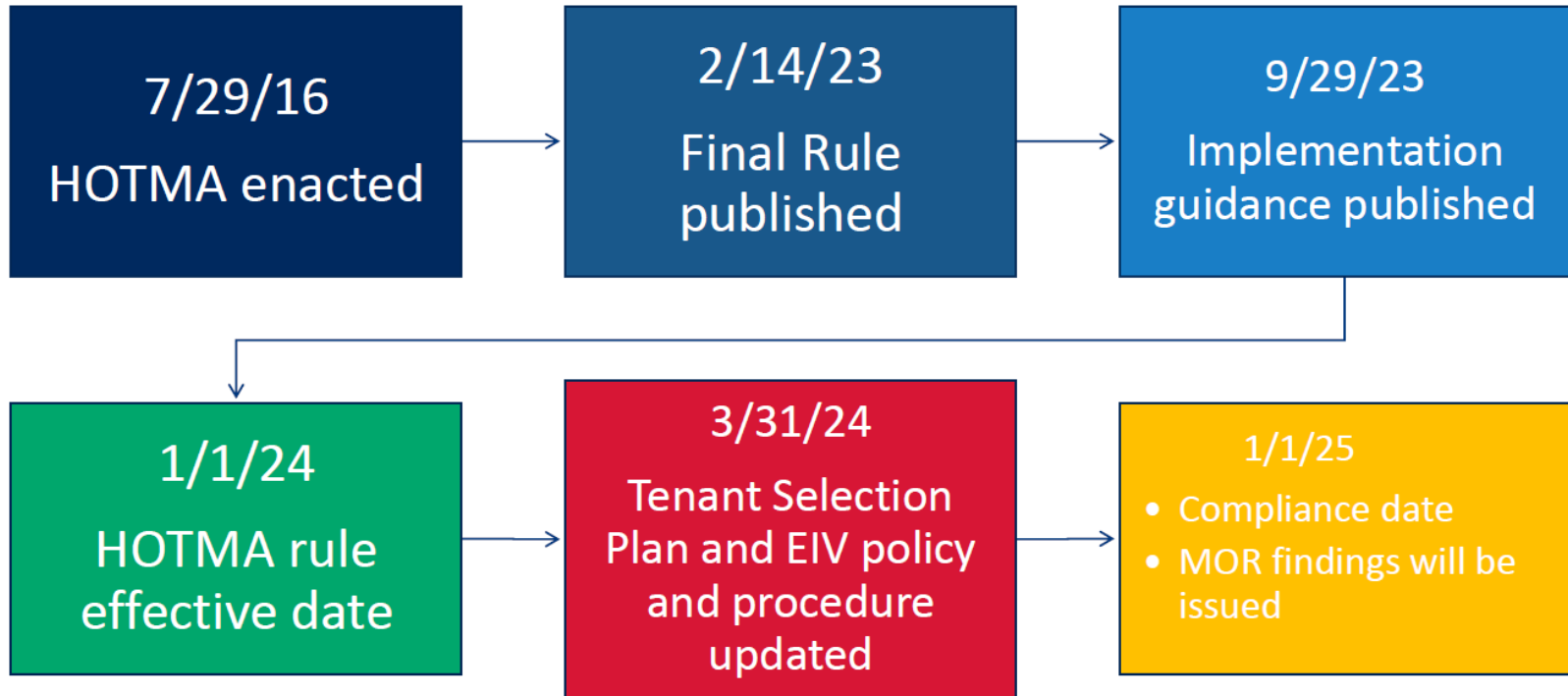
HUD's Responsibility

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



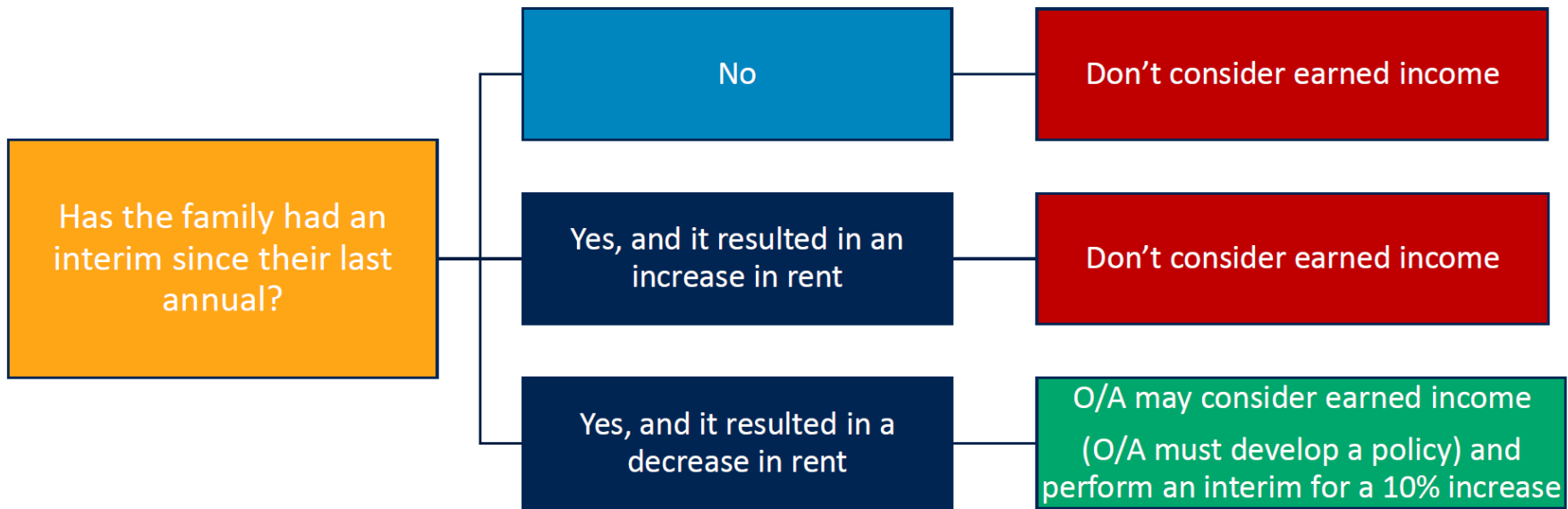
Corrections by 3/31/2024

- 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
- Provide tenants 60 days' notice that their lease will be modified at the end of the lease term after the expiration of the 60 days' notice.
- 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.
- 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
- Tracs is not ready yet

Asset limitations can't be enforced until new lease is issued and signed, and software and TSP updated. HUD said: don't tell tenants they'll need to move out

HUD resources

https://www.hud.gov/program_offices/housing/mfh/hotma

Dedicated HOTMA email address: 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

Notification

- Typically, 30 days ahead of time
- Upload to SharePoint
- Access SharePoint to start early

Closer to the date

Check in to schedule day-of appointments

Day of the MOR

- Physical
- Interview
- File Review
- Exit Interview

MOR Report

- To you within 30 days

Management Response

- Due within 30 days

Resources On Our Website

www.rihousing.com/section-8-contract-administration/

SECTION 8 CONTRACT ADMINISTRATION

The Project-Based Section 8 program is one of the largest housing resources for low-income individuals and families in Rhode Island. RIHousing serves as the Contract Administrator on behalf of HUD for project-based Section 8 in Rhode Island. Under the program, a Housing Assistance Payment (HAP) contract is entered between HUD and the project's owner for a specific period of time. Eligible tenants generally pay 30% of adjusted income toward rent and HUD provides the HAP subsidy for the remaining portion of the rent to the owner.



As Contract Administrator, RIHousing:

- Processes monthly tenant vouchers
- Processes Housing Assistance Payments
- Processes rent and utility adjustments
- Performs Management and Occupancy Review, that includes a physical inspection

Management and Occupancy Reviews



Annual Rent Adjustments (OCAFs and RCSs)



Contract Renewals



Vouchers and Special Claims



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)



Previous MOR:	Unsatisfactory	Below Average	Satisfactory	Above Average	Superior
<i>Next MOR must be conducted within...</i>					
Risk Classification: 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
Risk Classification: 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
Risk Classification: 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



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

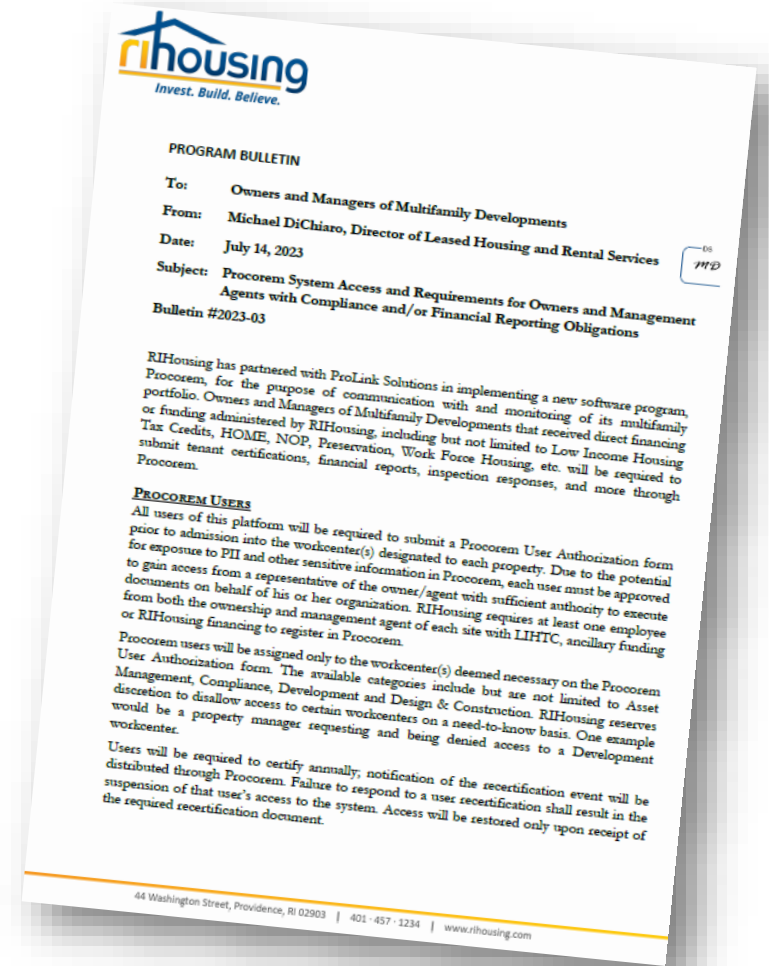


**ProLink recommends Google Chrome for best results,
but Microsoft Edge will work too.**



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.



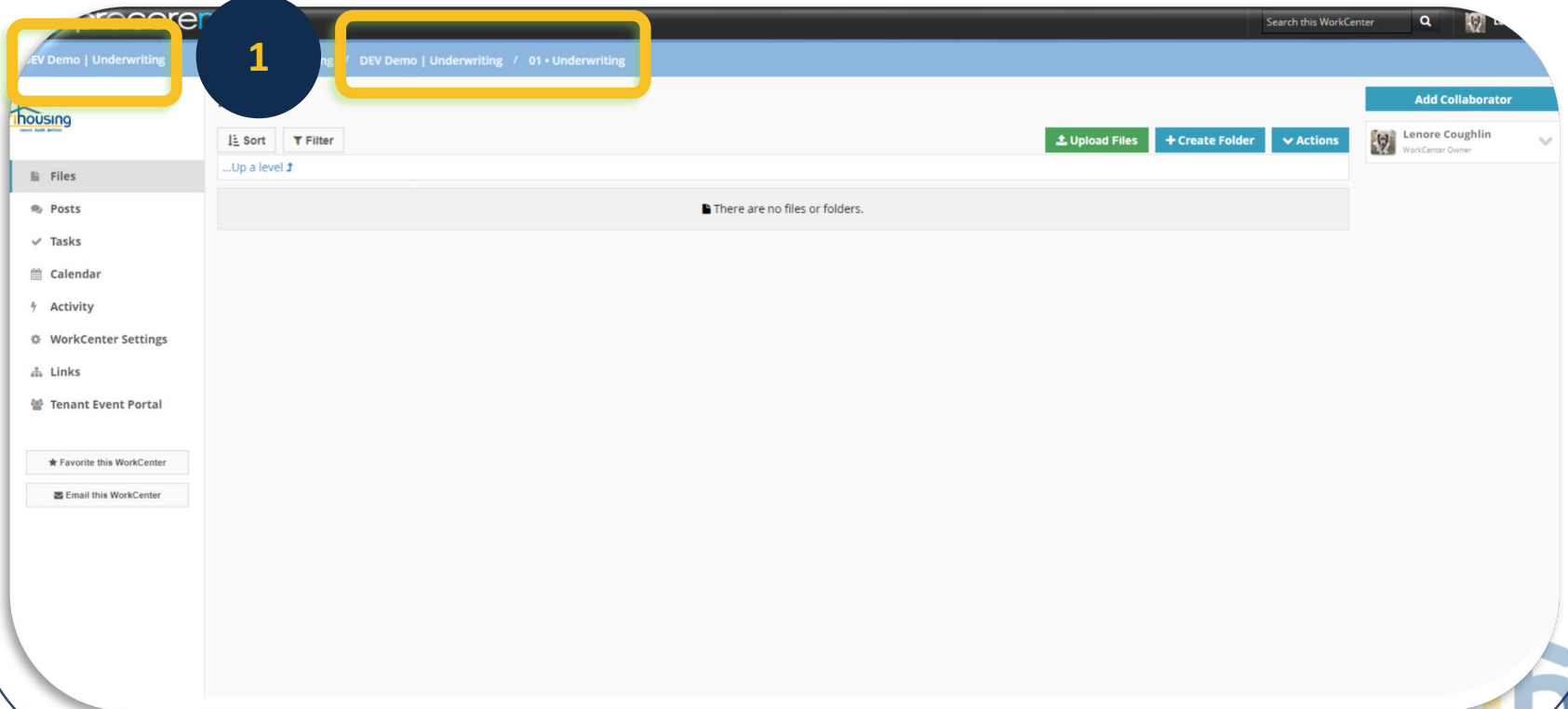


Uploading Files

1

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

1



The screenshot displays the Procurem WorkCenter interface. The breadcrumb navigation path is 'DEV Demo | Underwriting / 01 - Underwriting', with both segments highlighted by yellow boxes. A large blue circle with the number '1' is positioned over the breadcrumb path. The main content area shows a file management interface with a message: 'There are no files or folders.' The left sidebar contains navigation options: Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The top right corner features a search bar and a collaborator dropdown menu for Lenore Coughlin, WorkCenter Owner. The bottom right corner of the screenshot shows a large blue 'm' logo.

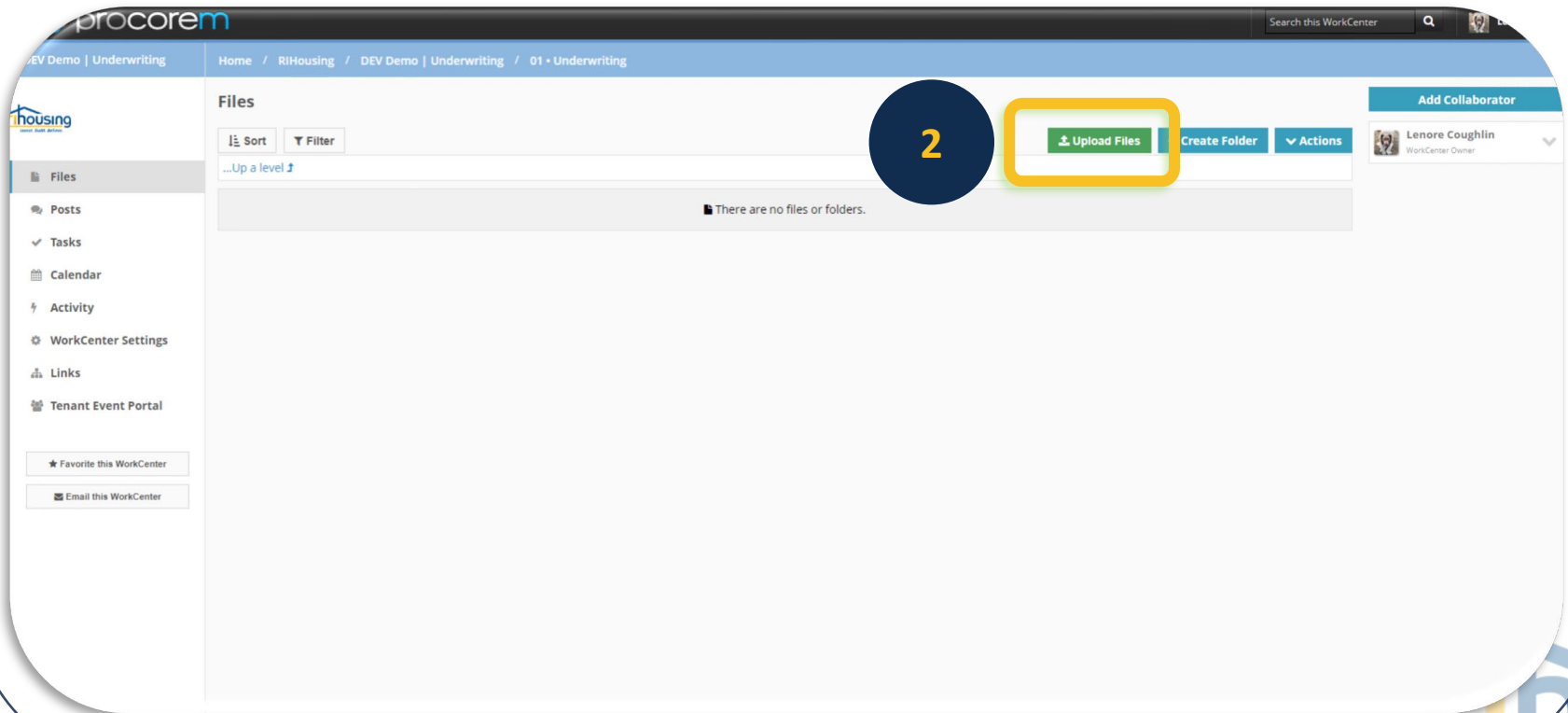




Uploading Files

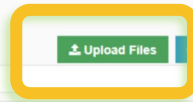
2

Select Upload Files



The screenshot shows the Procorem Files interface. At the top, there is a breadcrumb trail: Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting. Below this, the 'Files' section is visible, featuring a 'Sort' and 'Filter' dropdown. A central message states 'There are no files or folders.' To the right, there are buttons for 'Upload Files', 'Create Folder', and 'Actions'. The 'Upload Files' button is highlighted with a yellow box and a dark blue circle containing the number '2'. On the far right, there is a 'Collaborator' section for 'Lenore Coughlin', identified as the 'WorkCenter Owner'.

2

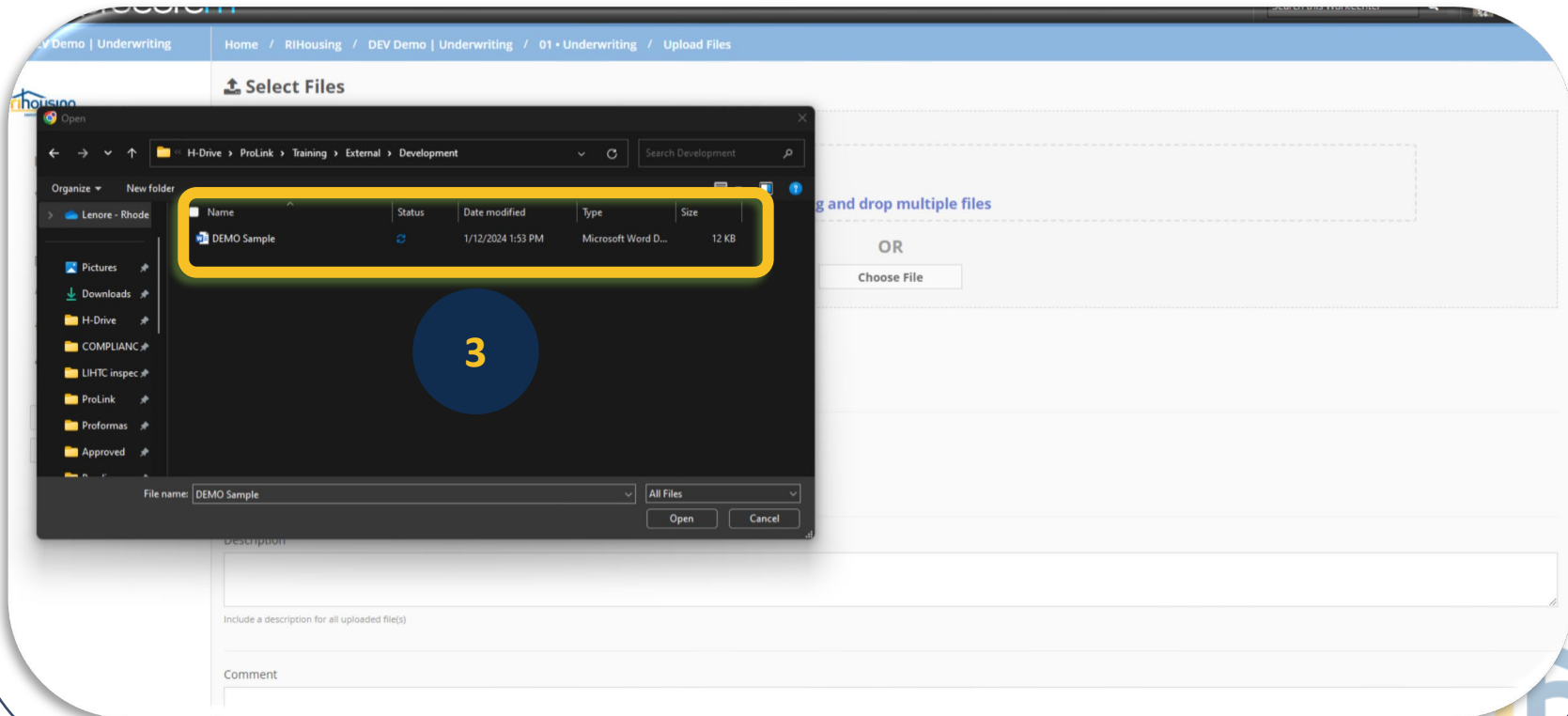




Uploading Files

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 the Procorem web interface for uploading files. The browser address bar shows the path: Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting / Upload Files. The page title is "Select Files". There is a large dashed box for "Drag and drop multiple files" and a "Choose File" button. Below this is a "Description" field and a "Comment" field. A Windows File Explorer window is open over the interface, showing the path: H-Drive > ProLink > Training > External > Development. A file named "DEMO Sample" is selected, with a yellow box around it. The file details are: Name: DEMO Sample, Status: (blue icon), Date modified: 1/12/2024 1:53 PM, Type: Microsoft Word D..., Size: 12 KB. A blue circle with the number "3" is overlaid on the File Explorer window. The Procorem logo is visible in the bottom right corner of the screenshot.

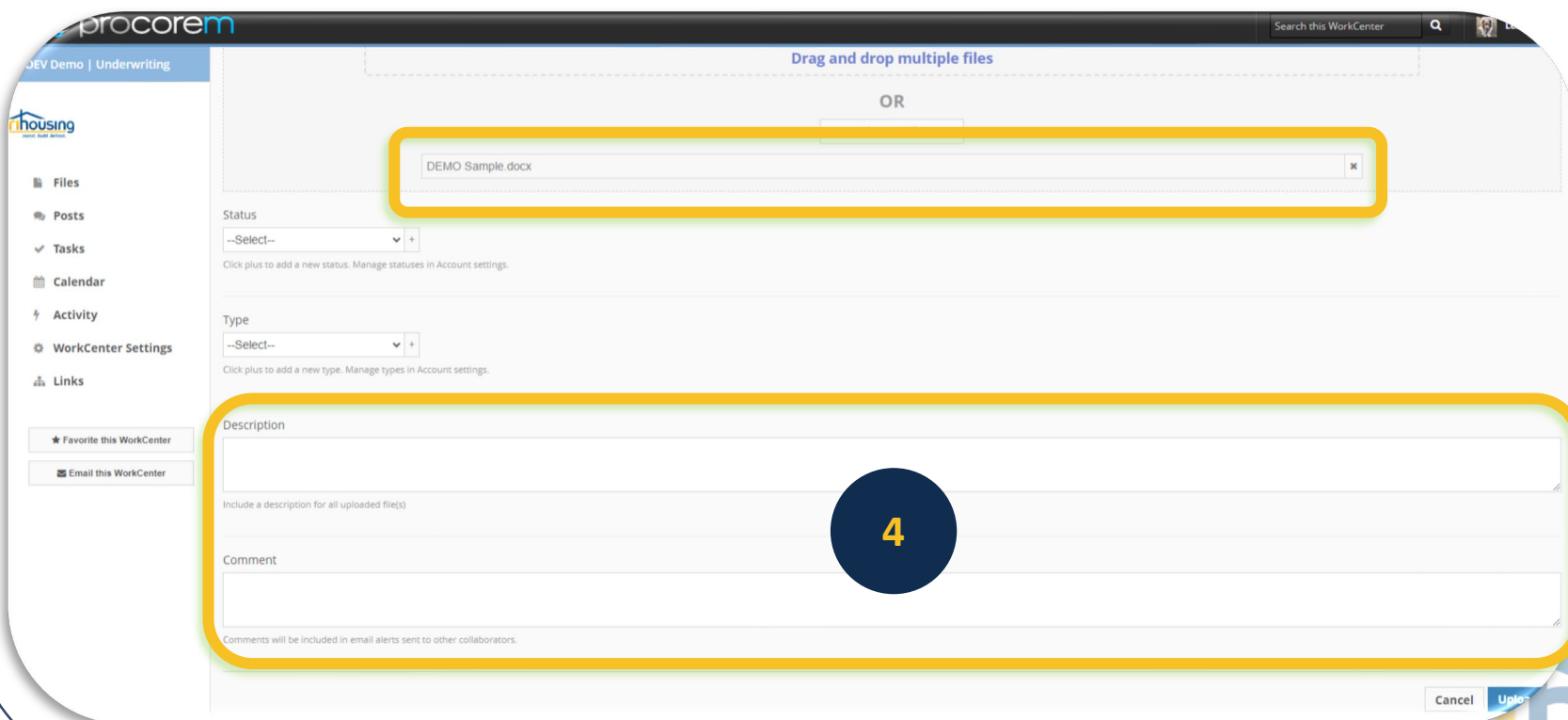




Uploading Files

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 indicates the area for "Drag and drop multiple files". An "OR" button is centered below this area. A file named "DEMO Sample.docx" is shown in a list, highlighted with a yellow border. Below the file list, there are two dropdown menus: "Status" and "Type", both 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." A yellow circle with the number "4" is overlaid on the "Description" field. At the bottom right, there are "Cancel" and "Upload" buttons.

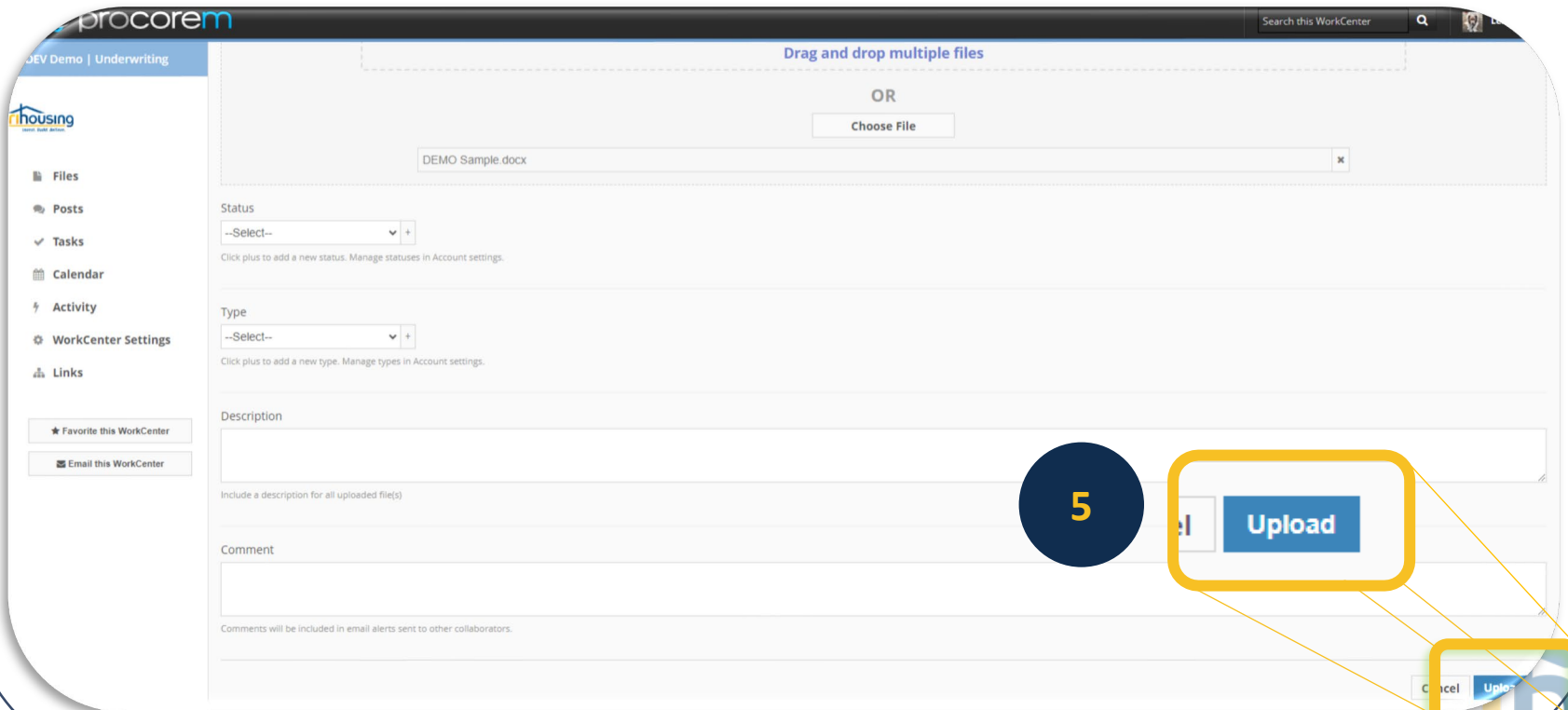
4



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 this, a dashed box indicates the area for "Drag and drop multiple files". A "Choose File" button is visible. A file named "DEMO Sample.docx" is shown in the upload area. Below the file name, there are dropdown menus for "Status" and "Type", both currently set to "--Select--". A "Description" field is present with a placeholder text "Include a description for all uploaded file(s)". A "Comment" field is also visible with 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 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 "Cancel" and "Upload" buttons at the bottom right.

5

Upload

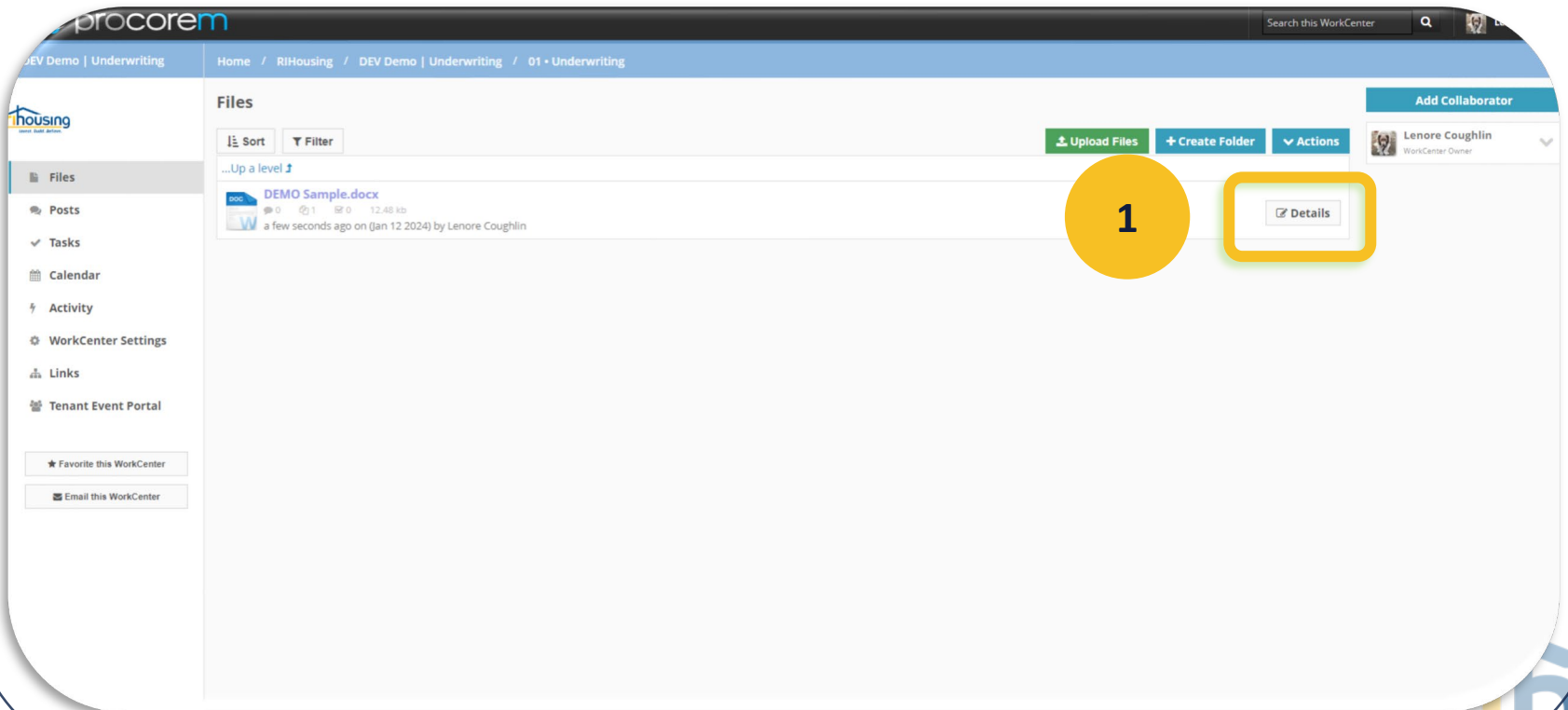
Cancel Upload



Upload New Versions of Files

1

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



The screenshot displays the Procorem web interface. At the top, the breadcrumb navigation reads: Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting. The main content area is titled 'Files' and contains a table with one file entry: 'DEMO Sample.docx', which was uploaded 'a few seconds ago on (Jan 12 2024) by Lenore Coughlin'. Above the file entry are buttons for 'Upload Files', 'Create Folder', and 'Actions'. To the right of the file entry, there is a 'Details' button, which is highlighted with a yellow box and a yellow circle containing the number '1'. The left sidebar includes navigation options like 'Files', 'Posts', 'Tasks', 'Calendar', 'Activity', 'WorkCenter Settings', 'Links', and 'Tenant Event Portal'. At the bottom of the sidebar, there are buttons for 'Favorite this WorkCenter' and 'Email this WorkCenter'. The top right corner of the interface shows a search bar and a user profile for 'Lenore Coughlin, WorkCenter Owner'.

1

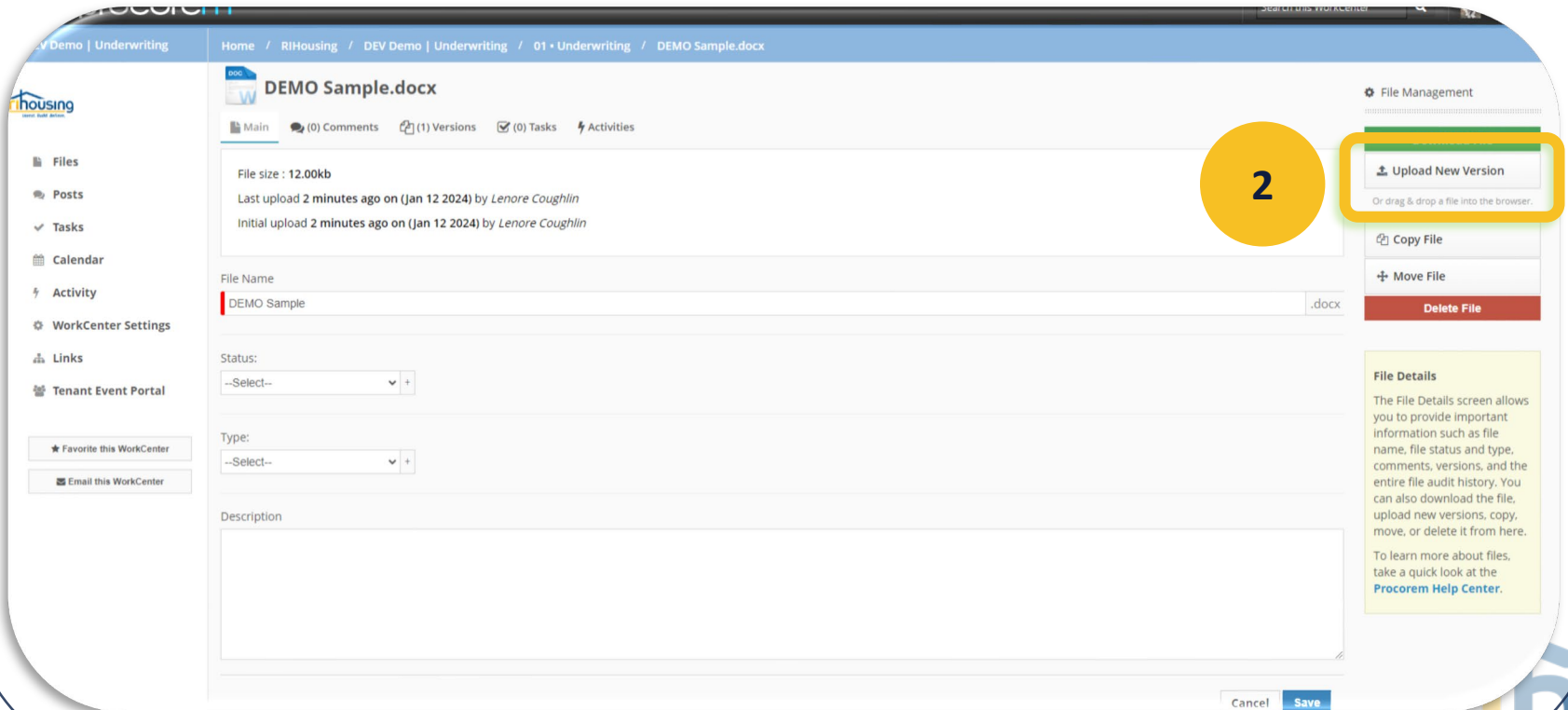
Details



Upload New Versions of Files

2

Select Upload New Version.



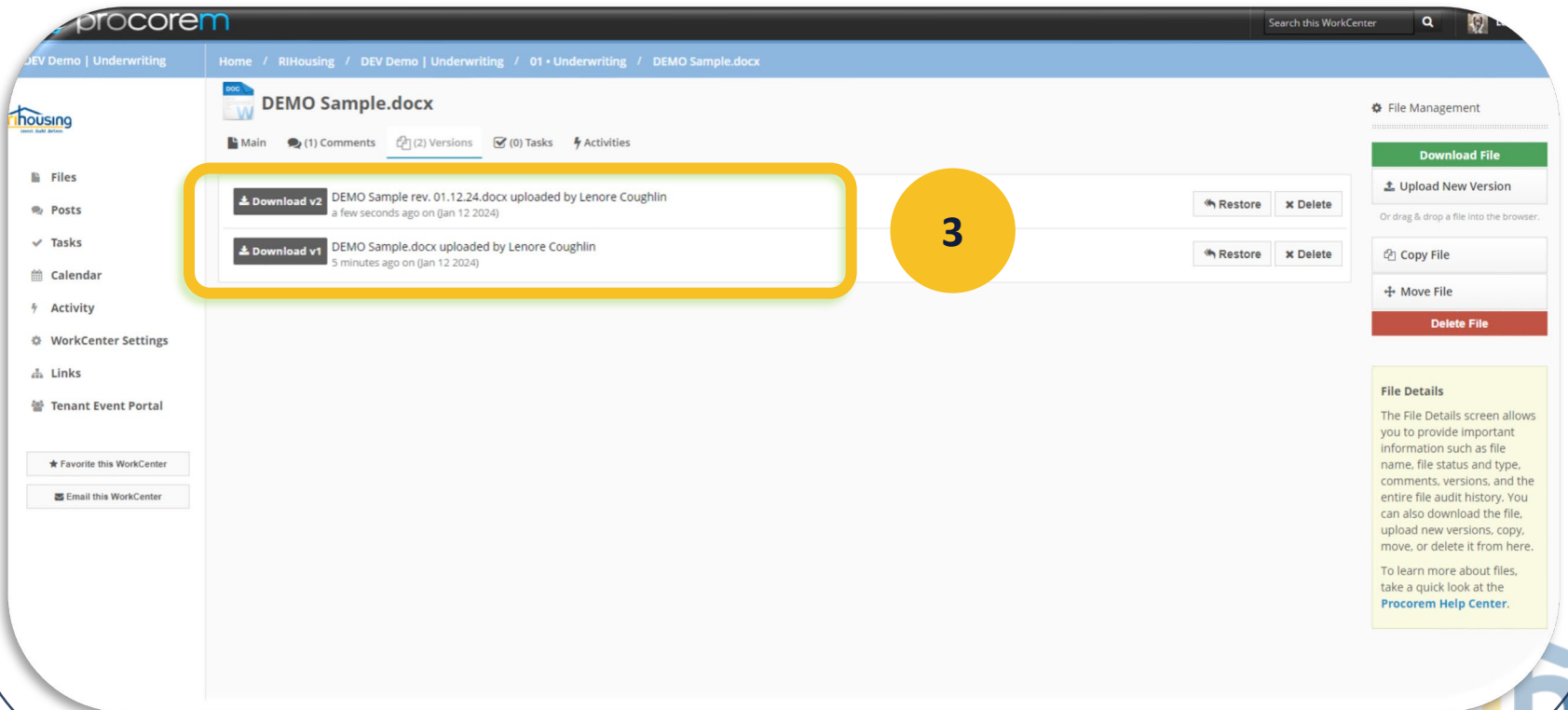
The screenshot shows the Procorem file management interface for a file named "DEMO Sample.docx". The interface includes a left sidebar with navigation options like "Files", "Posts", "Tasks", "Calendar", "Activity", "WorkCenter Settings", "Links", and "Tenant Event Portal". The main content area displays file details: "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, a "File Management" panel is visible, containing 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 number "2". 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 interface for a file named "DEMO Sample.docx". The "Versions" tab is active, showing a list of file versions. The top version, "DEMO Sample rev. 01.12.24.docx", is highlighted with a yellow box and a yellow circle containing the number "3". This version was uploaded by Lenore Coughlin a few seconds ago on Jan 12, 2024. Below it is the previous version, "DEMO Sample.docx", uploaded 5 minutes ago. The interface includes a left sidebar with navigation options like Files, Posts, Tasks, and Calendar. On the right, there are buttons for "Download File", "Upload New Version", "Copy File", "Move File", and "Delete File". A "File Details" section at the bottom right explains the purpose of the screen.

File Management

- Download File
- Upload New Version
- Copy File
- Move File
- Delete File

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](#).

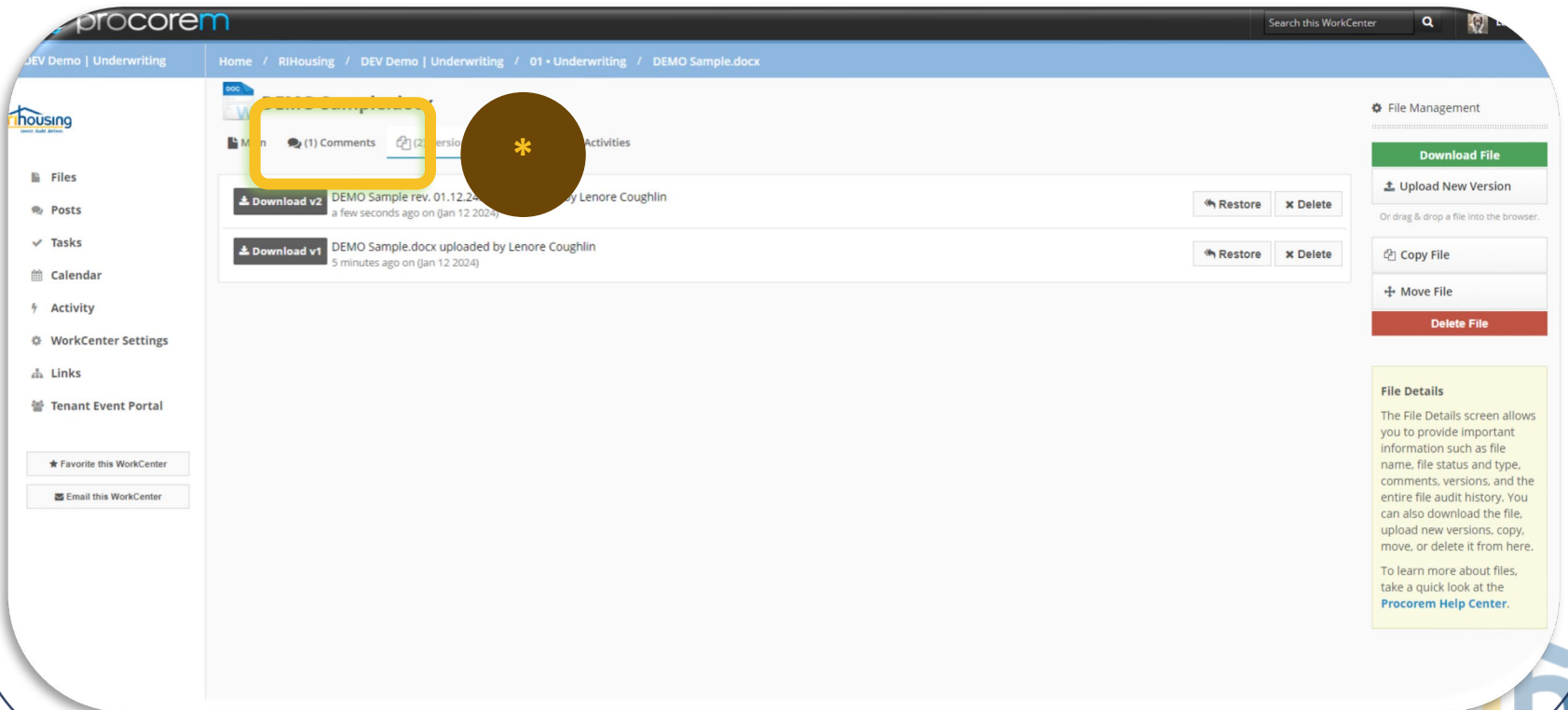
3



File Comments



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



The screenshot shows the Procorem file management interface. The breadcrumb path is: Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting / DEMO Sample.docx. The interface includes a sidebar with navigation options like Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area displays a list of file versions for 'DEMO Sample.docx'. The first version is 'DEMO Sample rev. 01.12.2024' uploaded by Lenore Coughlin, with a comment icon (1) and version icon (2) highlighted by a yellow box. A yellow asterisk icon is placed over the user name 'Lenore Coughlin'. The second version is 'DEMO Sample.docx uploaded by Lenore Coughlin'. On the right, there is a 'File Management' panel with buttons for 'Download File', 'Upload New Version', 'Copy File', 'Move File', and 'Delete File'. Below this is a 'File Details' section with explanatory text.

File Management

- Download File
- Upload New Version
- Copy File
- Move File
- Delete File

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](#).

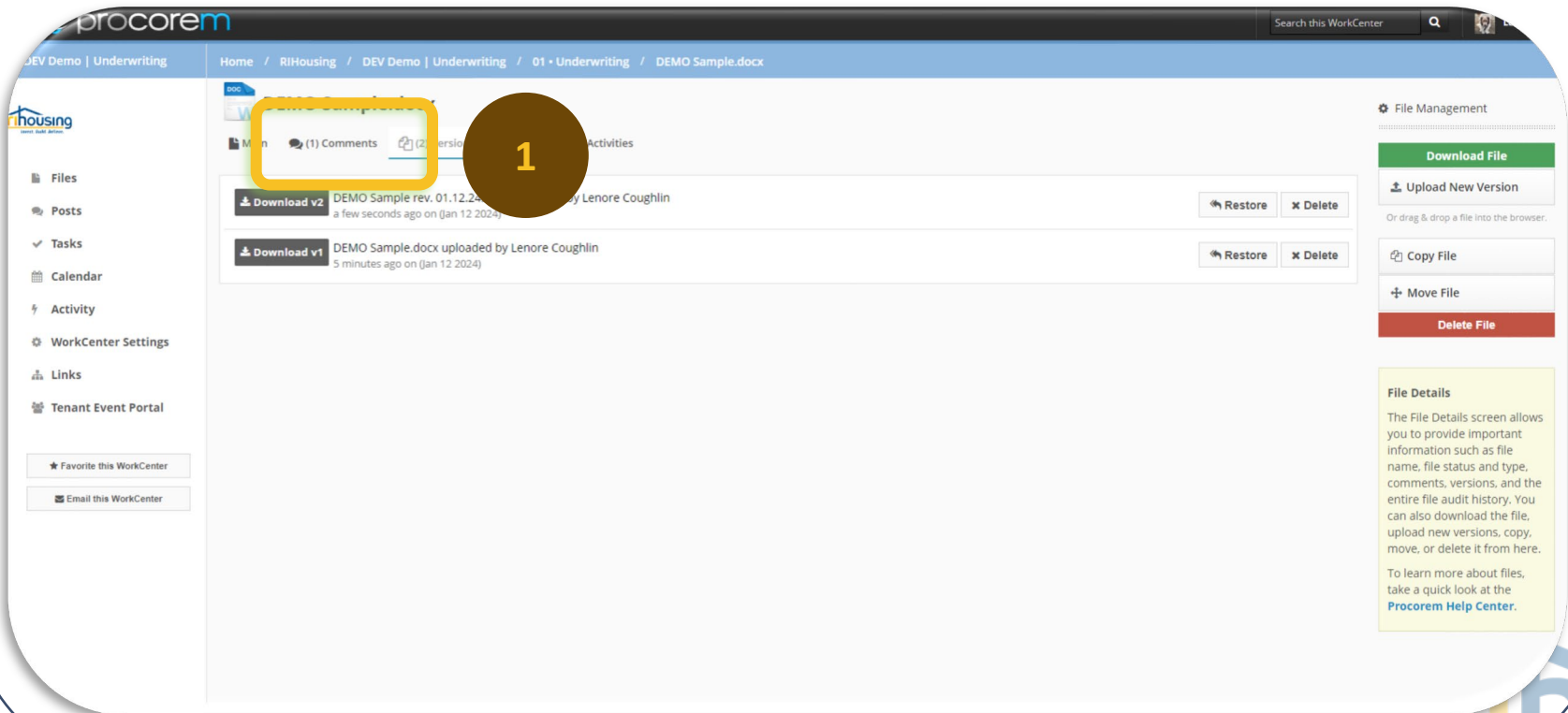




File Comments

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 left sidebar contains navigation options: Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area shows a list of file versions. The first version, "DEMO Sample rev. 01.12.2024", is highlighted with a yellow box, and a brown circle with the number "1" is placed over the "(1) Comments" link. The second version, "DEMO Sample.docx uploaded by Lenore Coughlin", is also visible. The right sidebar includes "File Management" options: Download File, Upload New Version, Copy File, Move File, and Delete File. A "File Details" section at the bottom right provides information about the file details screen.

procorem

Home / RIHousing / DEV Demo | Underwriting / 01 • Underwriting / DEMO Sample.docx

RIhousing

(1) Comments (2) Versions Activities

Download v2 DEMO Sample rev. 01.12.2024 a few seconds ago on (Jan 12 2024)

Download v1 DEMO Sample.docx uploaded by Lenore Coughlin 5 minutes ago on (Jan 12 2024)

Restore Delete

Restore Delete

File Management

Download File

Upload New Version

Copy File

Move File

Delete File

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](#).

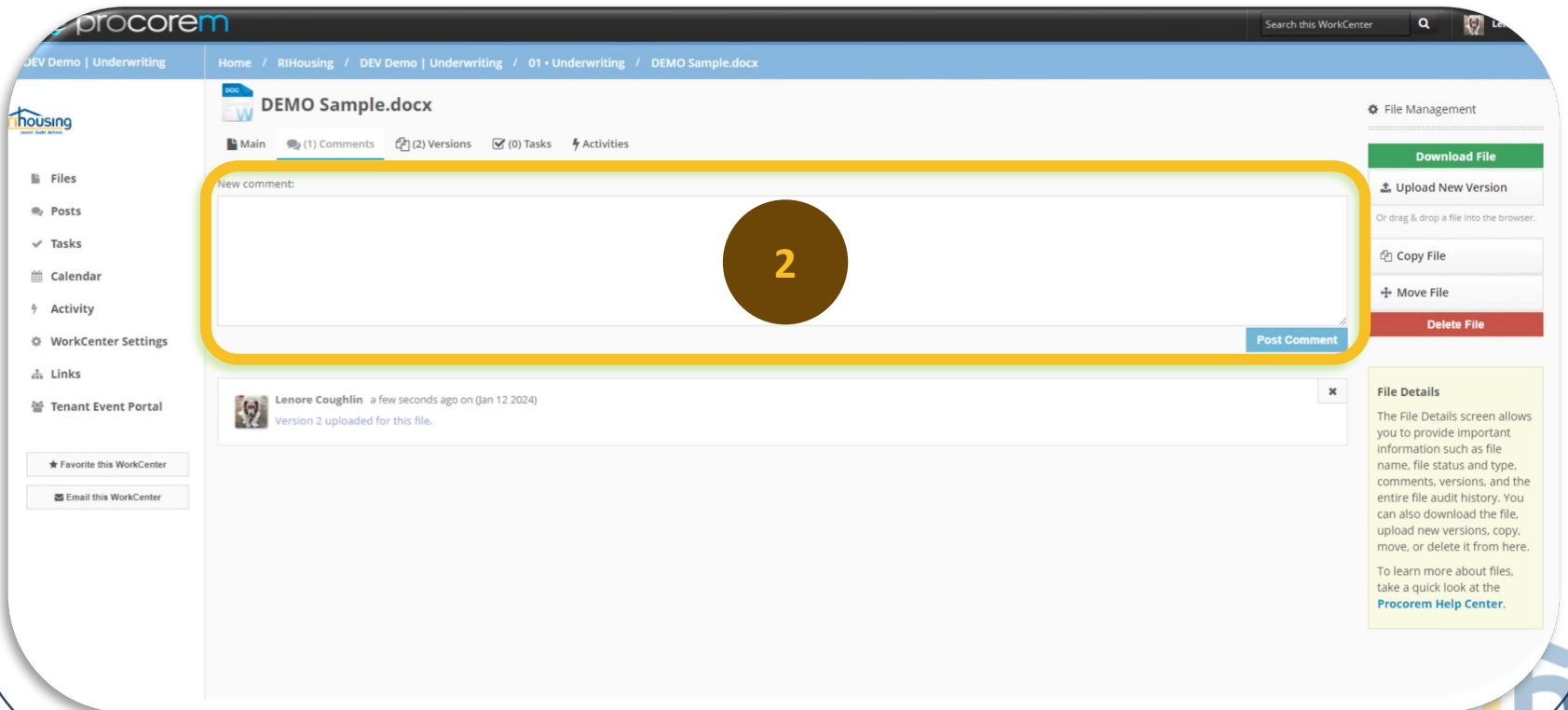




File Comments

2

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



The screenshot displays the Procorem 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 options include "Download File", "Upload New Version", "Copy File", "Move File", and "Delete File". A "File Details" sidebar is visible on the right. The main content area shows a "New comment:" text box with a "Post Comment" button. A comment by "Lenore Coughlin" is visible below, stating "Version 2 uploaded for this file." A large brown circle with the number "2" is overlaid on the comment box to indicate the step.

2

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](#).



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.

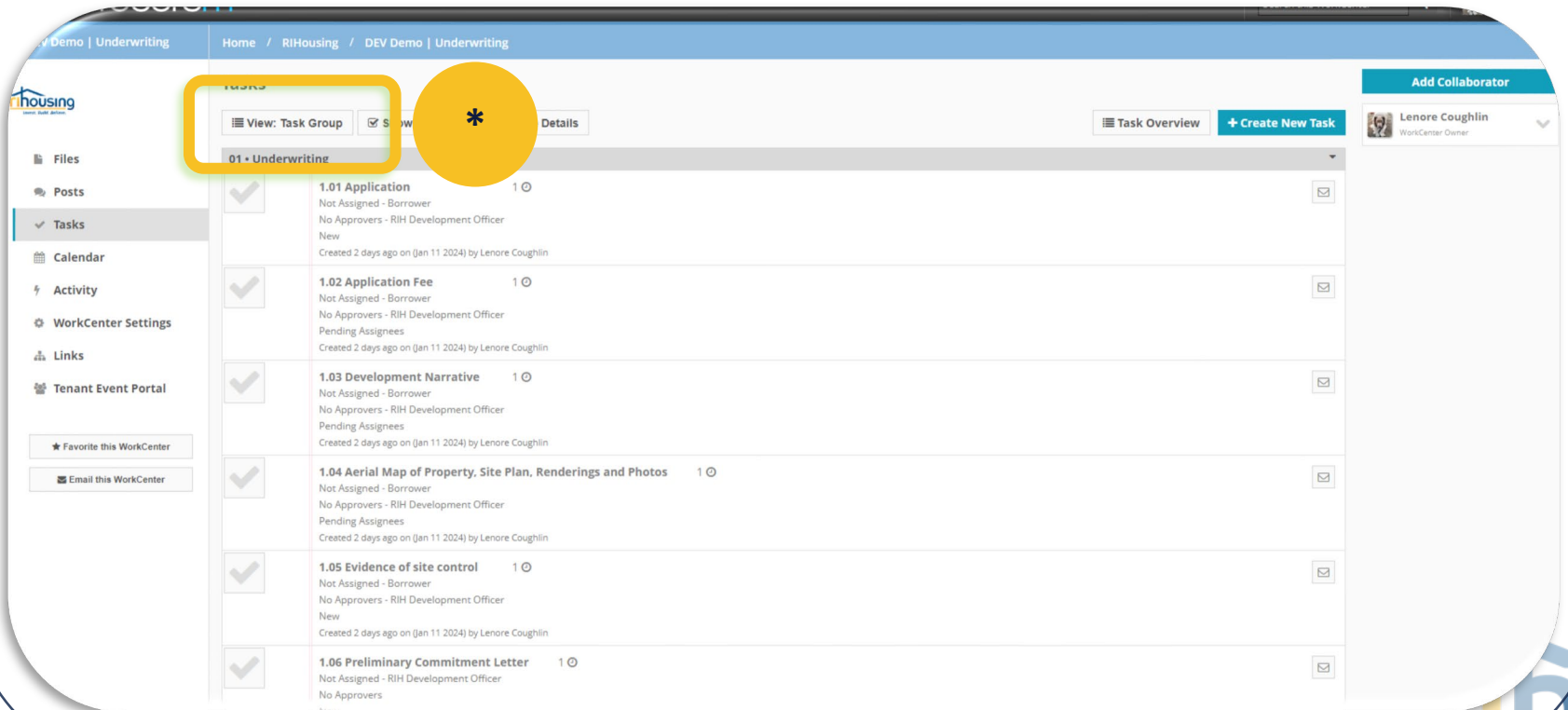




Task Grouping



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 shows the Procurement software interface. The breadcrumb navigation is "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 displays a list of tasks under the heading "01 - Underwriting". The tasks are grouped by task group, with each group heading in a grey bar. A yellow box highlights the "View: Task Group" button, and a yellow circle highlights an asterisk icon. The tasks listed are:

Task Group	Task Name	Status	Created By
1.01 Application	Not Assigned - Borrower No Approvers - RIH Development Officer New Created 2 days ago on (Jan 11 2024) by Lenore Coughlin	1	Lenore Coughlin
1.02 Application Fee	Not Assigned - Borrower No Approvers - RIH Development Officer Pending Assignees Created 2 days ago on (Jan 11 2024) by Lenore Coughlin	1	Lenore Coughlin
1.03 Development Narrative	Not Assigned - Borrower No Approvers - RIH Development Officer Pending Assignees Created 2 days ago on (Jan 11 2024) by Lenore Coughlin	1	Lenore Coughlin
1.04 Aerial Map of Property, Site Plan, Renderings and Photos	Not Assigned - Borrower No Approvers - RIH Development Officer Pending Assignees Created 2 days ago on (Jan 11 2024) by Lenore Coughlin	1	Lenore Coughlin
1.05 Evidence of site control	Not Assigned - Borrower No Approvers - RIH Development Officer New Created 2 days ago on (Jan 11 2024) by Lenore Coughlin	1	Lenore Coughlin
1.06 Preliminary Commitment Letter	Not Assigned - RIH Development Officer No Approvers	1	Lenore Coughlin

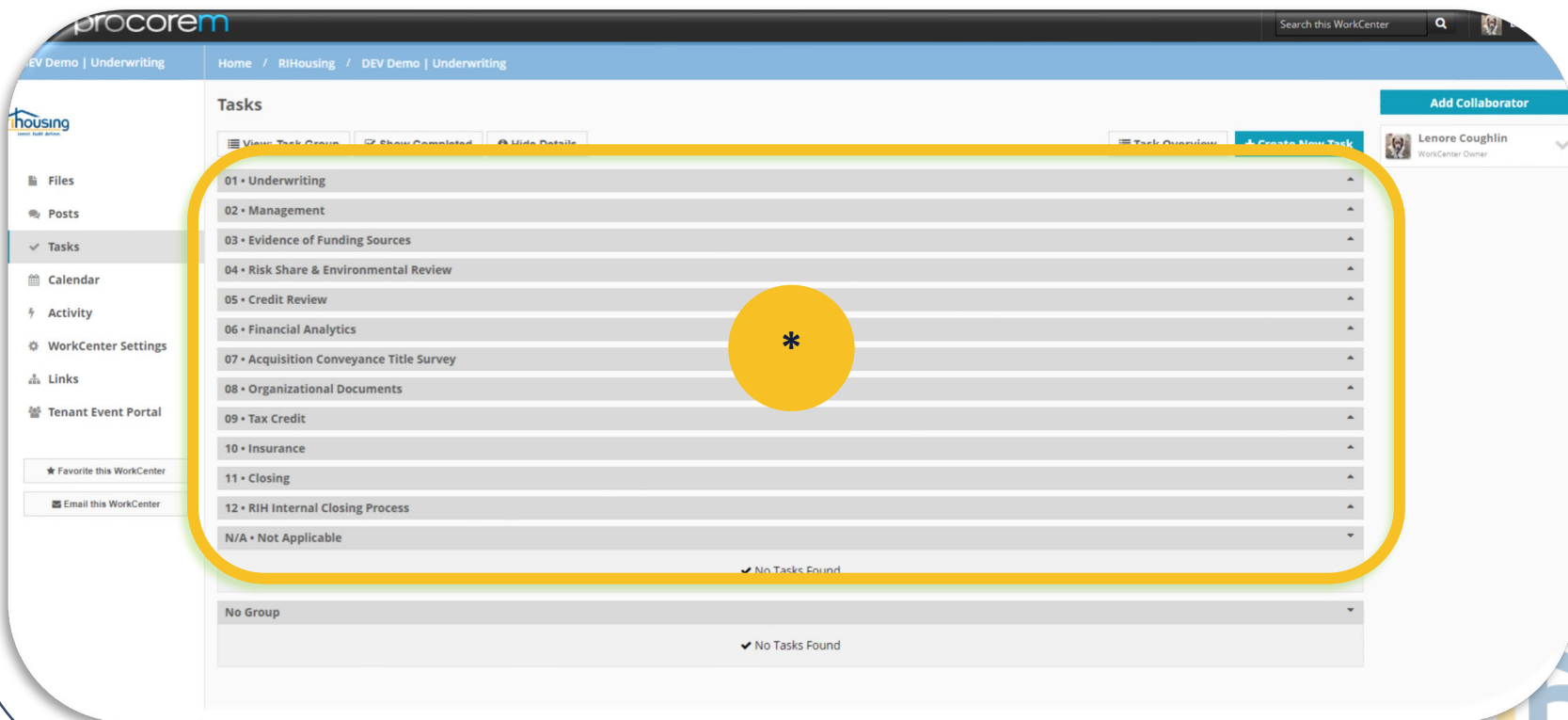




Task Grouping



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, listing various task groups. A yellow box highlights the list of task groups, and a yellow circle with an asterisk is placed over the '06 • Financial Analytics' heading, indicating that this heading is clickable to collapse the tasks beneath it.

Task Group	Collapsible
01 • Underwriting	Yes
02 • Management	Yes
03 • Evidence of Funding Sources	Yes
04 • Risk Share & Environmental Review	Yes
05 • Credit Review	Yes
06 • Financial Analytics	Yes
07 • Acquisition Conveyance Title Survey	Yes
08 • Organizational Documents	Yes
09 • Tax Credit	Yes
10 • Insurance	Yes
11 • Closing	Yes
12 • RIH Internal Closing Process	Yes
N/A • Not Applicable	No
No Group	No

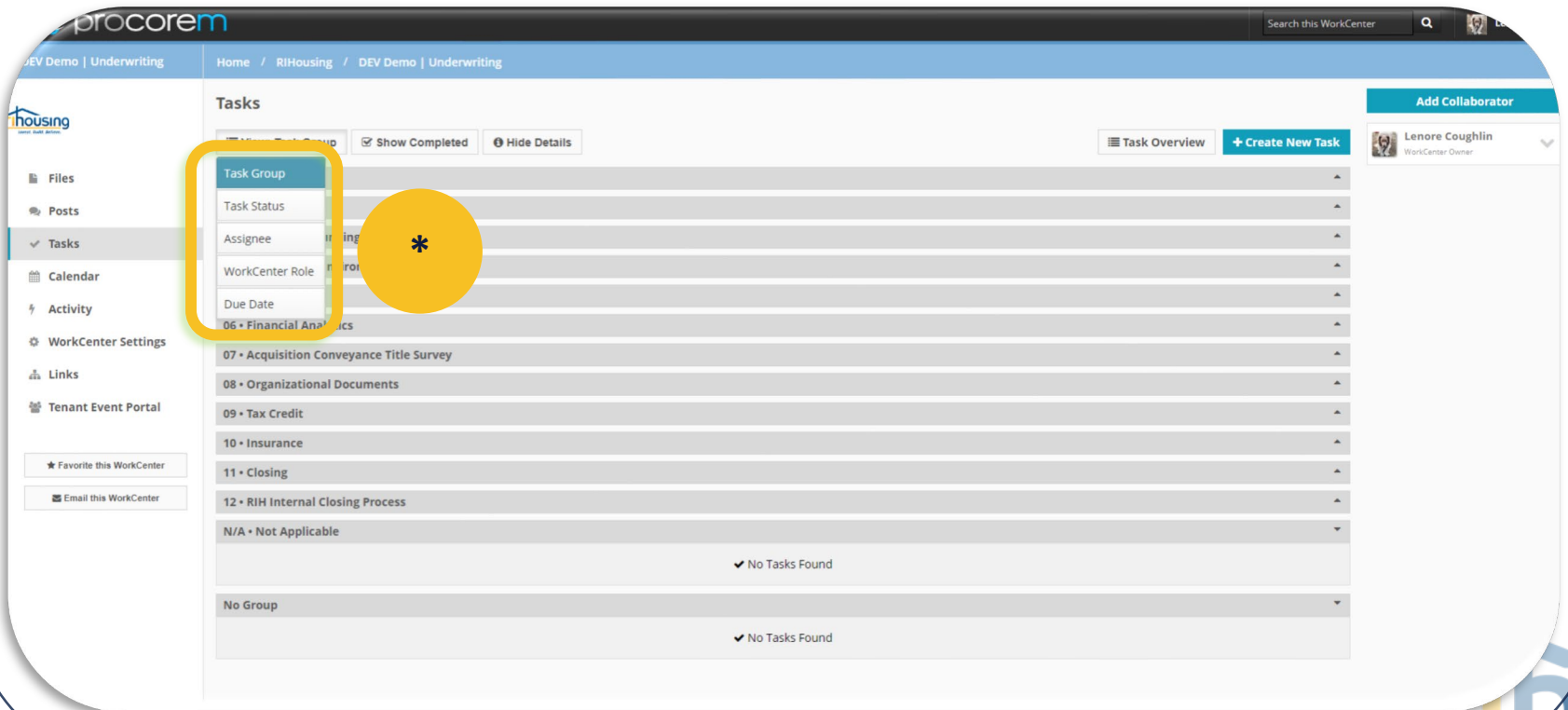




Task Grouping



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

Below the list, there are two entries with a checkmark and the text 'No Tasks Found':

- ✓ No Tasks Found
- ✓ 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).

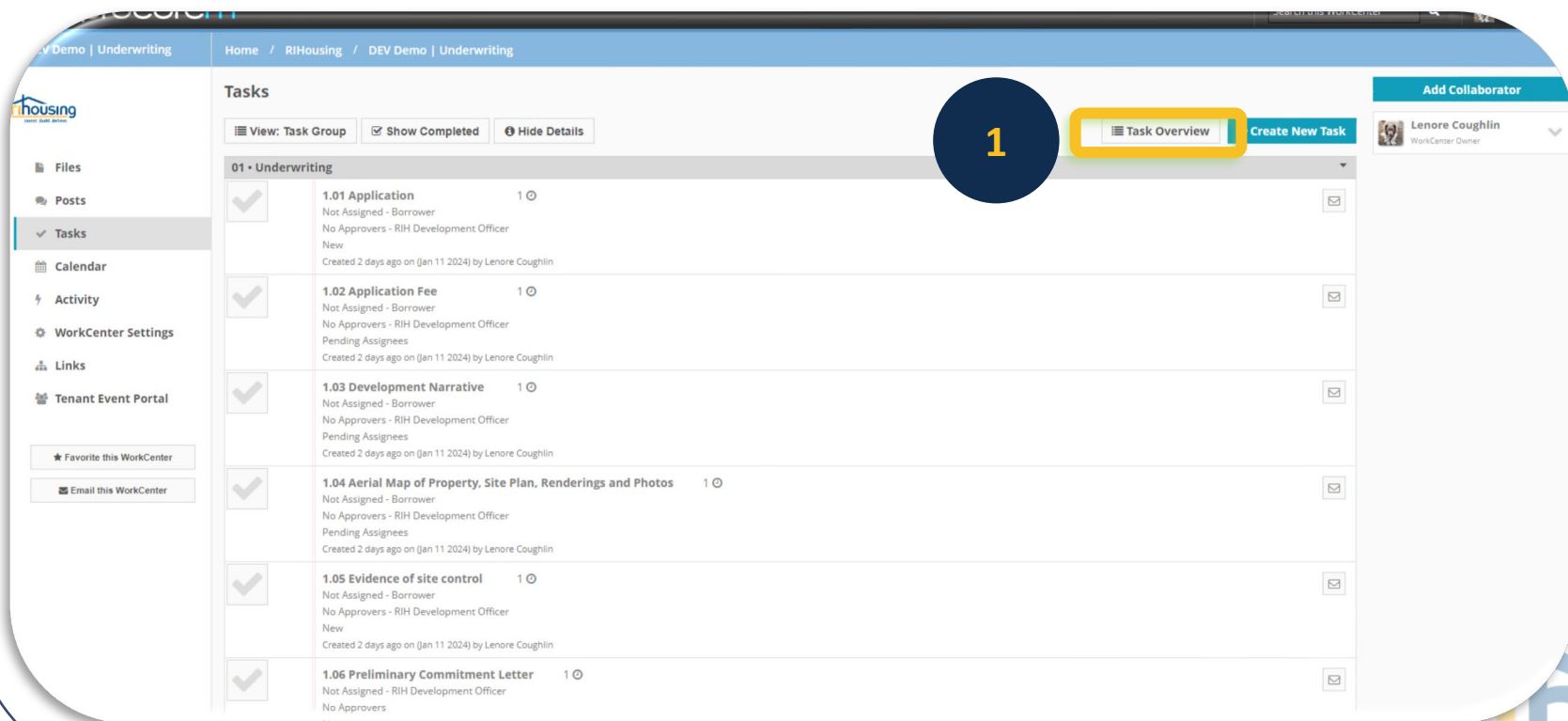




Task Filtering

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 'Task Overview' interface. A yellow box highlights the 'Task Overview' button in the top right corner of the task list, with a blue circle containing the number '1' next to it. 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 a list of tasks under the group '01 - Underwriting'. Each task entry includes a checkbox, a title, status, and creation details. A right sidebar shows the user profile for 'Lenore Coughlin' with an 'Add Collaborator' button.

Task ID	Title	Status	Created By
1.01	Application	Not Assigned - Borrower	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 - Borrower	Lenore Coughlin





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						

2

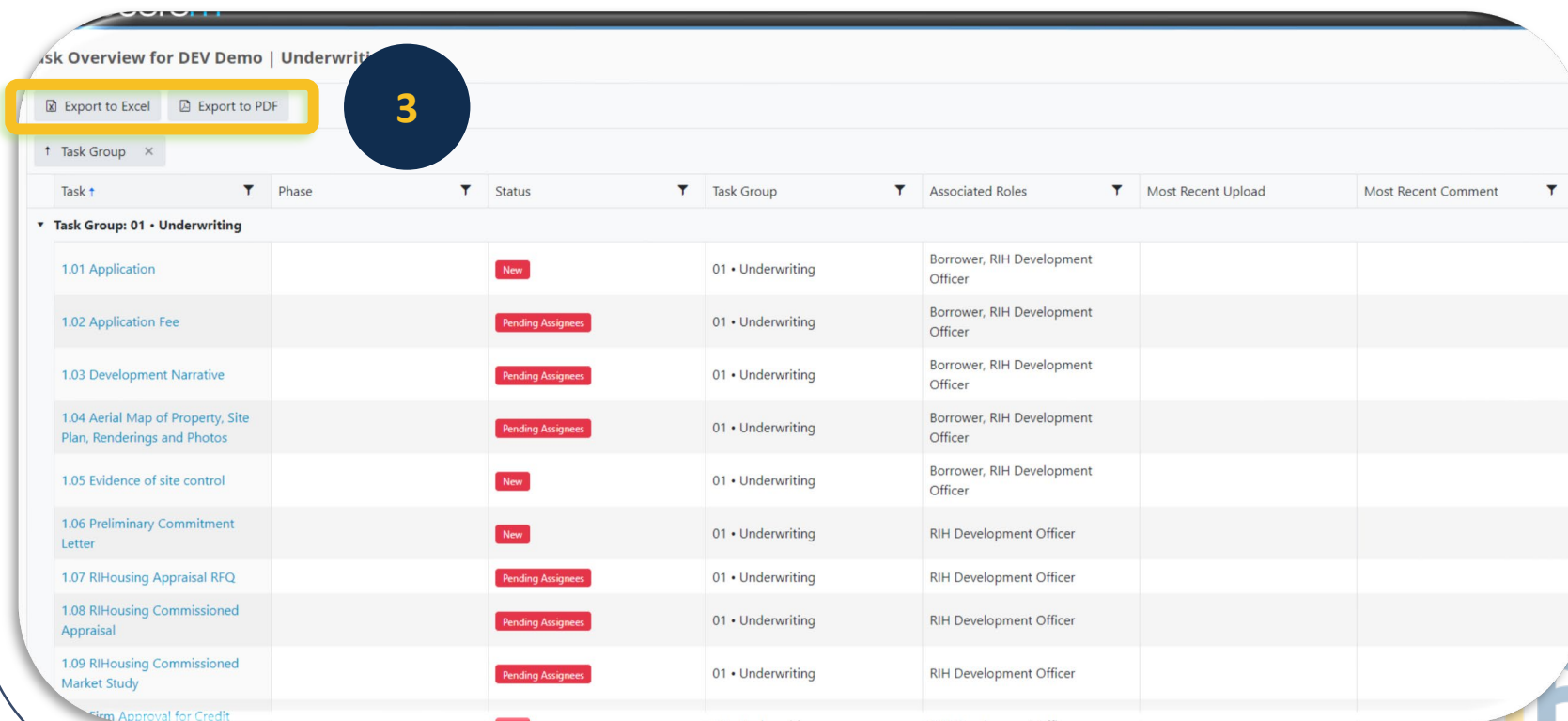




Task Filtering

3

Export to Excel (preferred) or PDF if desired.



The screenshot shows the 'Task Overview for DEV Demo | Underwriting' page. At the top, there are two buttons: 'Export to Excel' and 'Export to PDF', both highlighted with a yellow box and a blue circle containing the number '3'. Below the buttons is a table with the following 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
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		

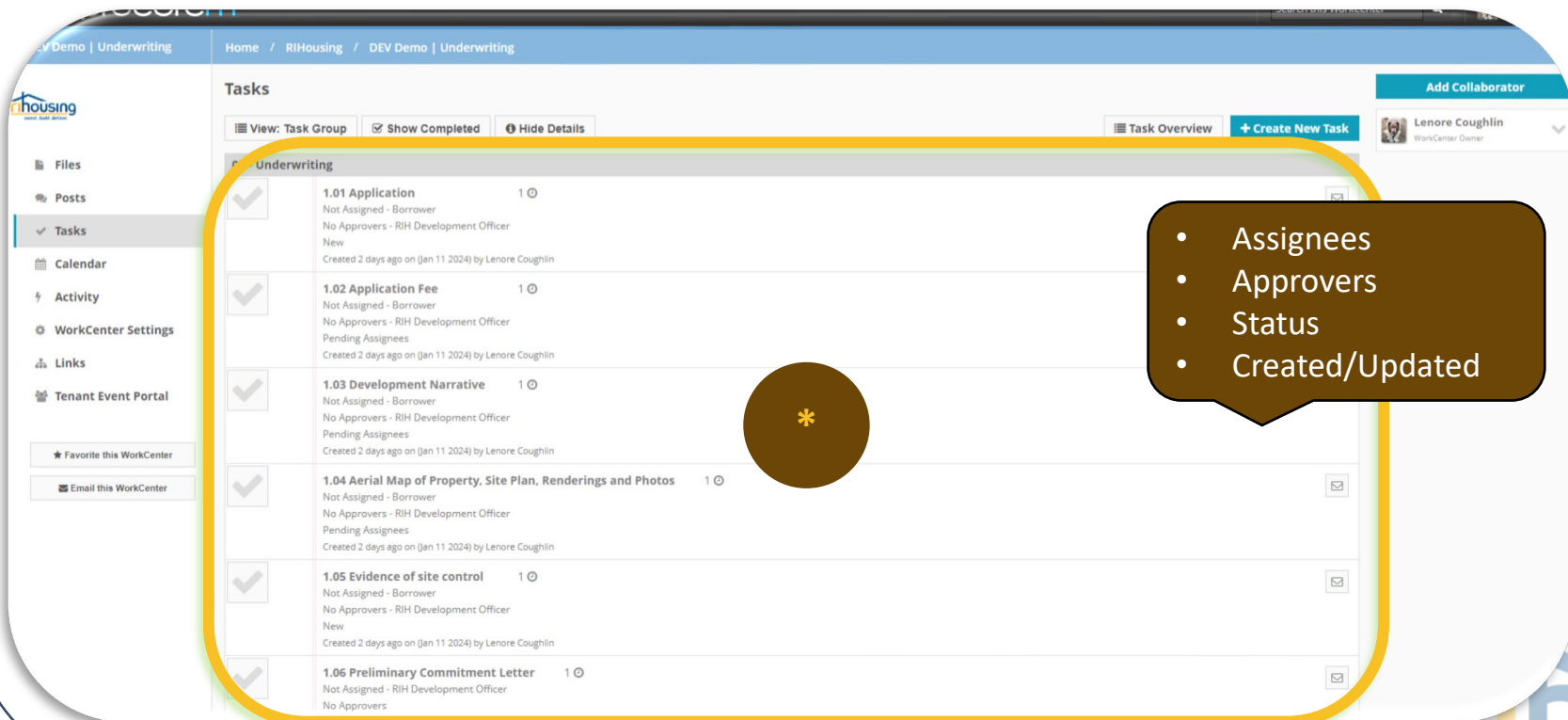




Task Details



Some task details can be seen on the Tasks page.

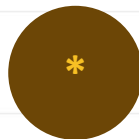


The screenshot displays the 'Tasks' page in the Procorem system. The page title is 'Tasks' and the breadcrumb trail is 'Home / RIHousing / DEV Demo | Underwriting'. The left sidebar contains navigation options: Files, Posts, Tasks (selected), Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area 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	

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

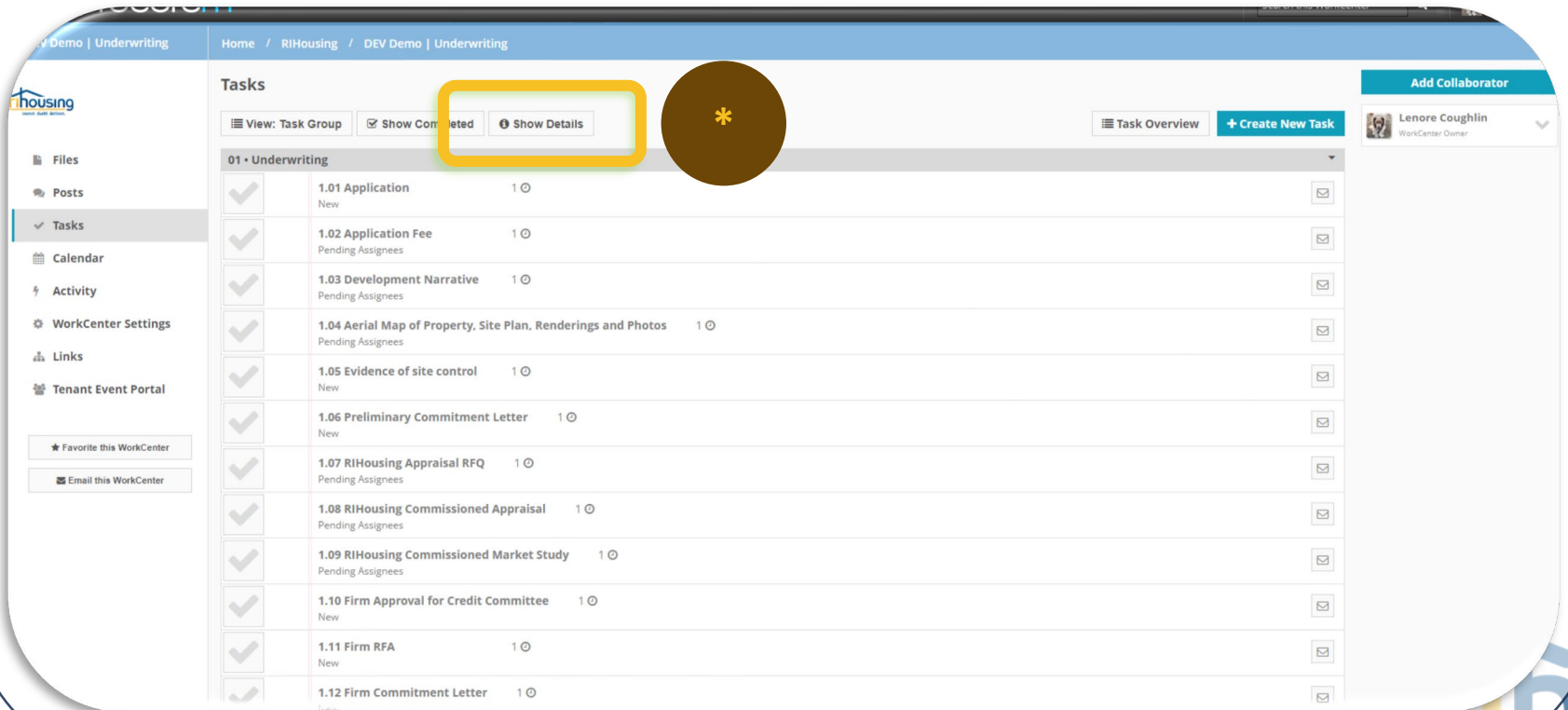




Task Details



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



The screenshot shows the Procorem interface for a 'Task Group'. The 'Tasks' section is active, displaying a list of tasks under the group '01 - Underwriting'. The 'Show Details' button is highlighted with a yellow box, and a brown circle with an asterisk is placed over it. The interface includes a sidebar with navigation options like Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area shows a list of tasks with columns for checkboxes, task names, status, counts, and action icons. A right-hand sidebar shows the user profile for Lenore Coughlin, WorkCenter Owner, with an 'Add Collaborator' button.

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

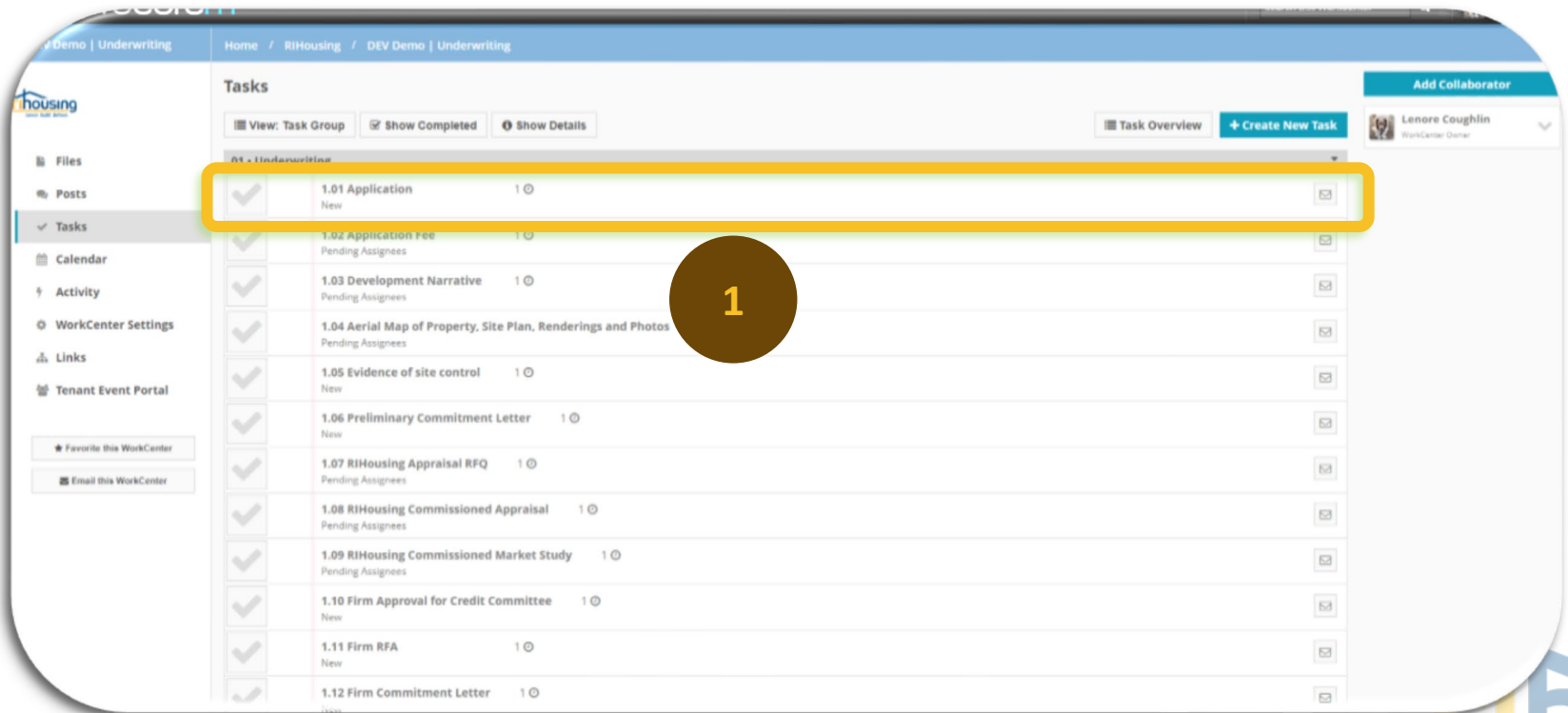




Task Details

1

Click on a task to see the Task Details screen.



Task Name	Status	Count
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

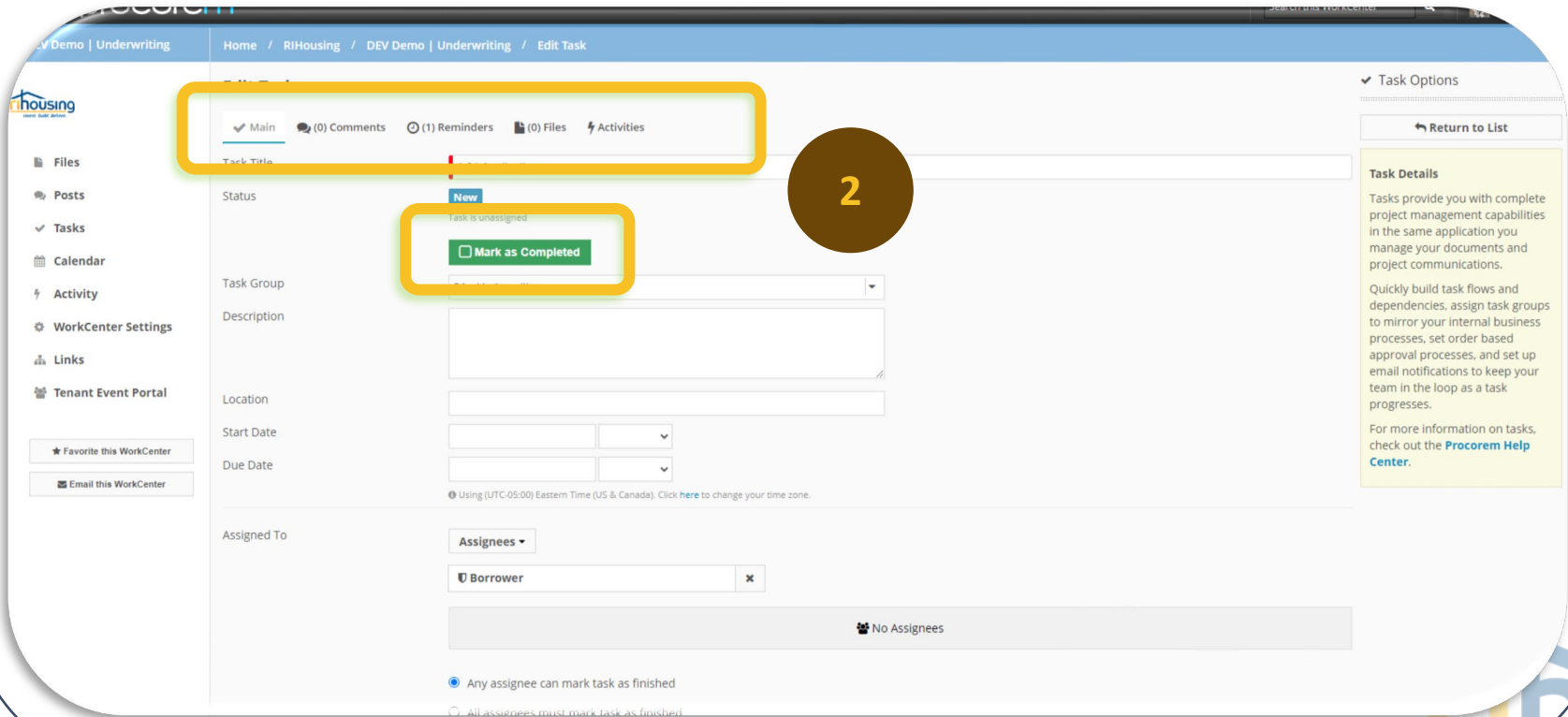




Task Details

2

Complete the task or add Comments and Files as applicable.



The screenshot displays the 'Task Details' page in the Procorem application. The page is titled 'Edit Task' and shows a task with the following details:

- Task Title:** A text input field with a 'New' button and a 'Mark as Completed' button (highlighted with a green box).
- Status:** 'Task is unassigned'.
- Task Group:** A dropdown menu.
- Description:** A text area.
- Location:** A text input field.
- Start Date:** A date picker.
- Due Date:** A date picker.
- Assigned To:** A dropdown menu showing 'Assignees' and a list of assignees, including 'Borrower'.

On the right side, there is a 'Task Options' section with a 'Return to List' button and a 'Task Details' section with a description of tasks and a link to the 'Procorem Help Center'.

Annotations on the screenshot include a yellow box around the top navigation bar (Main, Comments, Reminders, Files, Activities) and a brown circle with the number '2' next to the 'Mark as Completed' button.

2

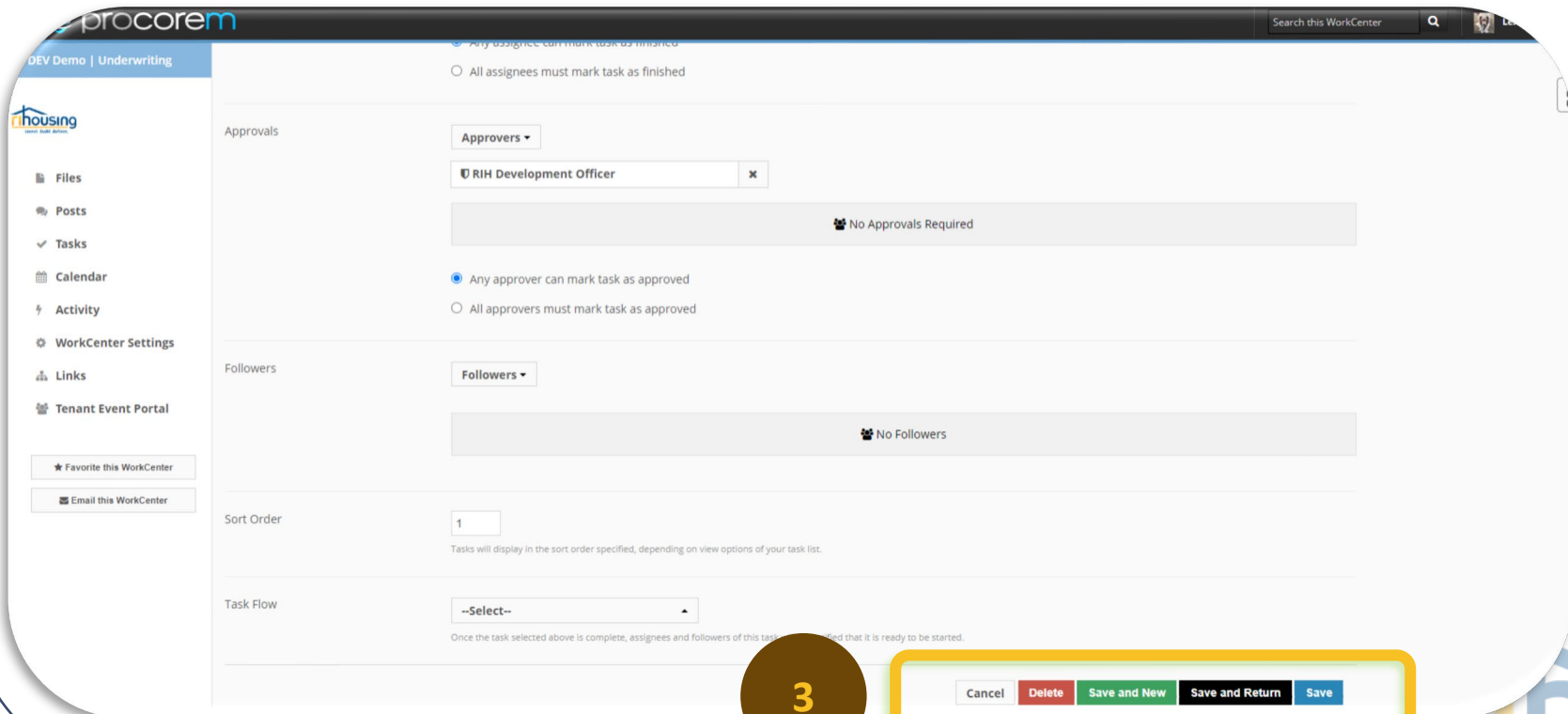




Task Details

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 Task Details form. The form includes sections for Approvals, Followers, Sort Order, and Task Flow. The Approvals section has a dropdown for 'Approvers' with 'RIH Development Officer' selected. The Followers section has a dropdown for 'Followers' with 'No Followers' displayed. The Sort Order section has a text input field with '1'. The Task Flow section has a dropdown menu with '--Select--'. At the bottom of the form, there is a row of buttons: 'Cancel', 'Delete', 'Save and New', 'Save and Return', and 'Save'. A yellow box highlights these buttons, and a brown circle with the number '3' is placed next to it.

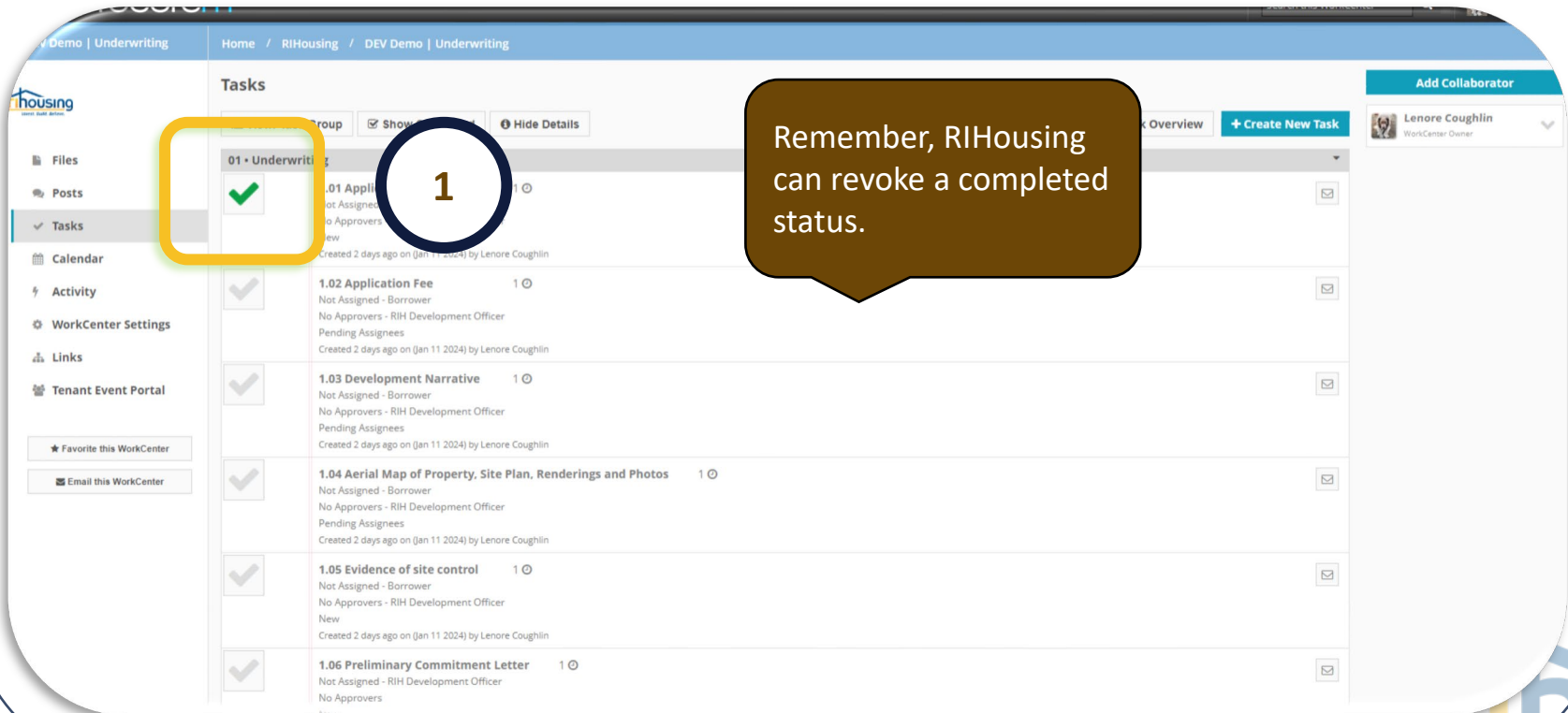
3



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 Procorem interface. 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 'Tasks'. The first task, '01 - Underwriting', 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 this checkmark. Below it, a brown speech bubble contains the text: 'Remember, RIHousing can revoke a completed status.' The task list includes details such as 'Not Assigned - Borrower', 'No Approvers - RIH Development Officer', and 'Pending Assignees'. Other tasks listed include '1.02 Application Fee', '1.03 Development Narrative', '1.04 Aerial Map of Property, Site Plan, Renderings and Photos', '1.05 Evidence of site control', and '1.06 Preliminary Commitment Letter'. The right sidebar shows the user profile for 'Lenore Coughlin' and an 'Add Collaborator' button.

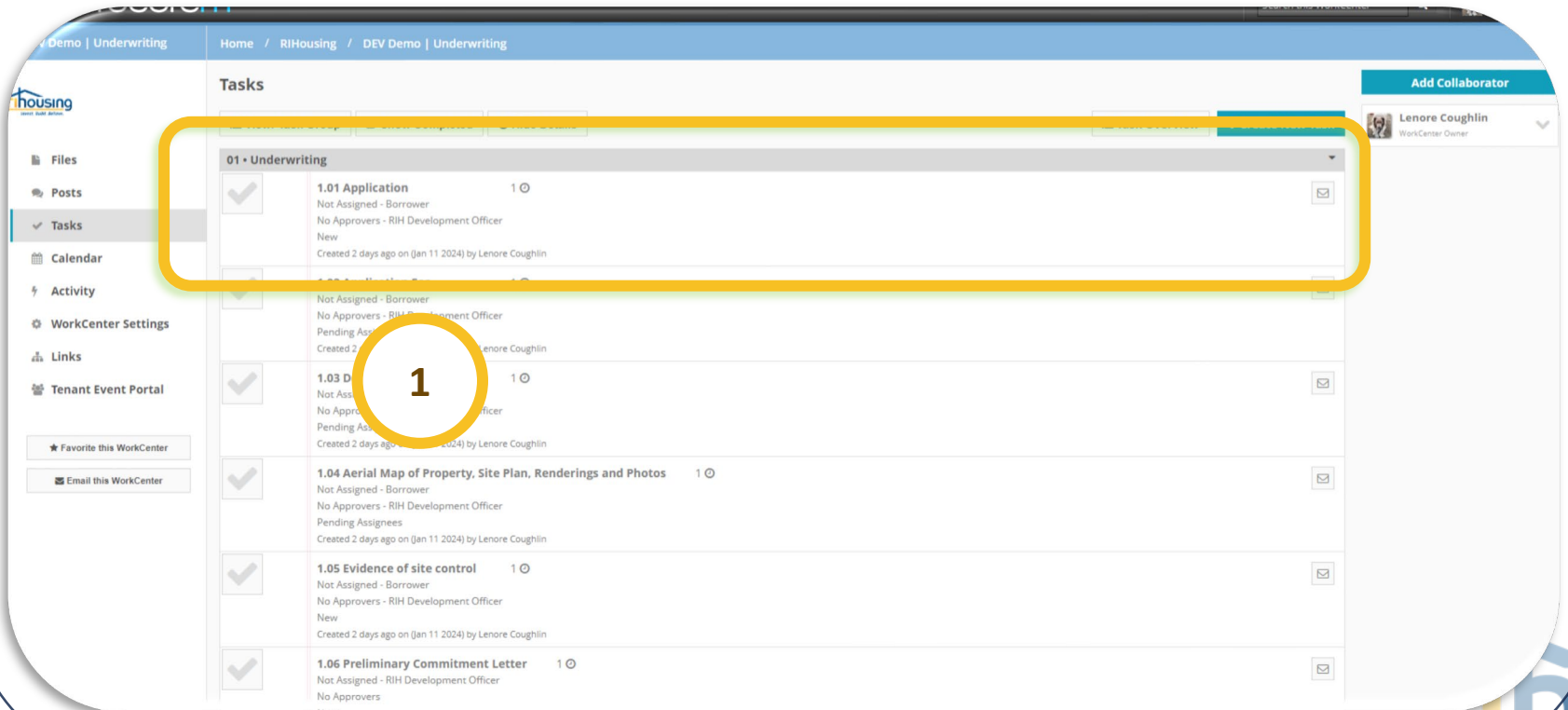




Completing Tasks | Option 2

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 under the heading "01 - Underwriting". A yellow rectangular box highlights the first task, "1.01 Application". A yellow circle with the number "1" inside is positioned over the task title. The task details are as follows:

Task ID	Task Title	Status	Created By
1.01	Application	Not Assigned - Borrower	Lenore Coughlin
1.03	D...	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 - Borrower	Lenore Coughlin

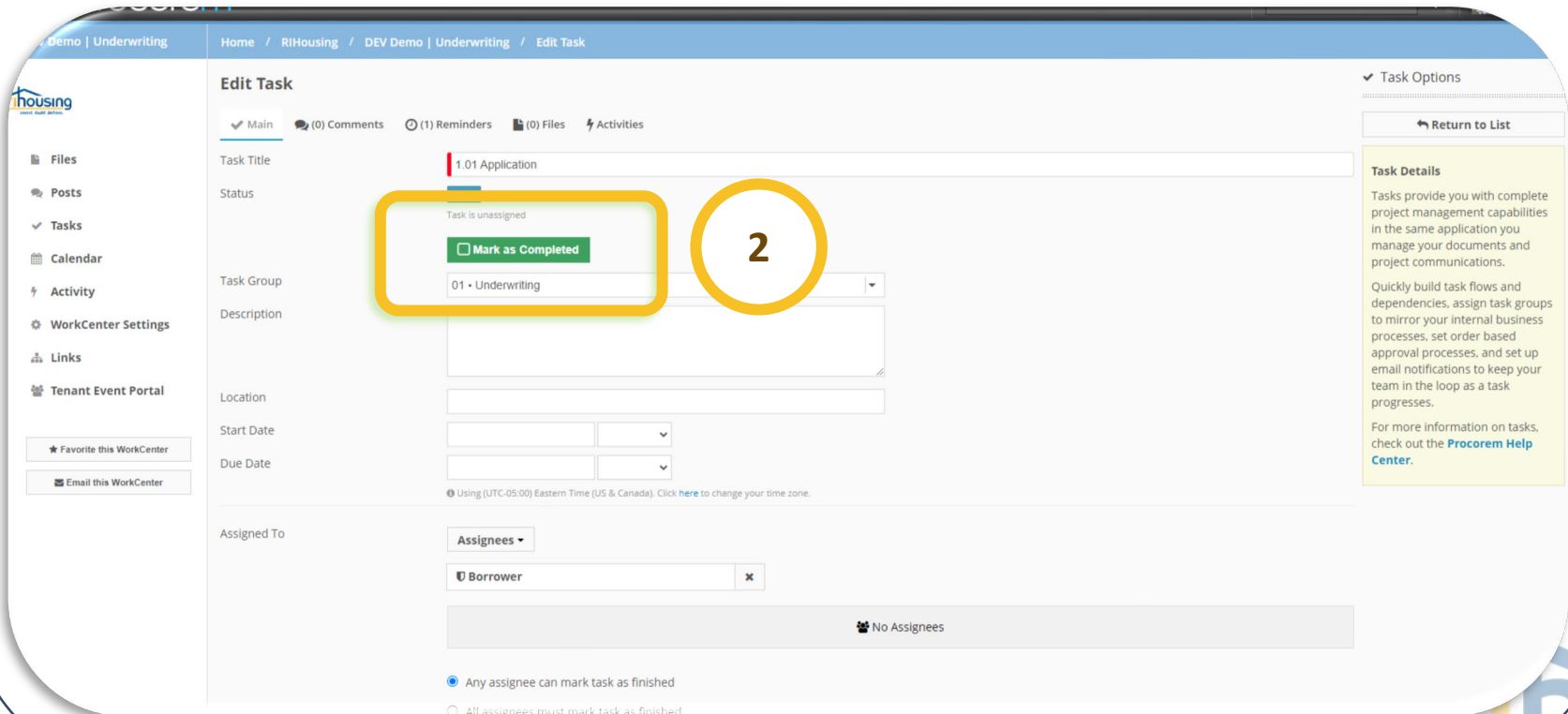




Completing Tasks | Option 2

2

Click **Mark as Completed**.



The screenshot displays the 'Edit Task' page in the Procorem system. The breadcrumb trail at the top reads: Home / RIHousing / DEV Demo | Underwriting / Edit Task. The left sidebar contains navigation options: Files, Posts, Tasks, Calendar, Activity, WorkCenter Settings, Links, and Tenant Event Portal. The main content area shows the task details for '1.01 Application'. The 'Status' is 'Task is unassigned'. A green button labeled 'Mark as Completed' is highlighted with a yellow box. A yellow circle with the number '2' is positioned to the right of this button. Below the 'Mark as Completed' button, the 'Task Group' is set to '01 - Underwriting'. The 'Assigned To' field is populated with 'Borrower'. A 'Task Options' sidebar on the right includes 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 button options for marking tasks as finished: 'Any assignee can mark task as finished' (selected) and 'All assignees must mark task as finished'.



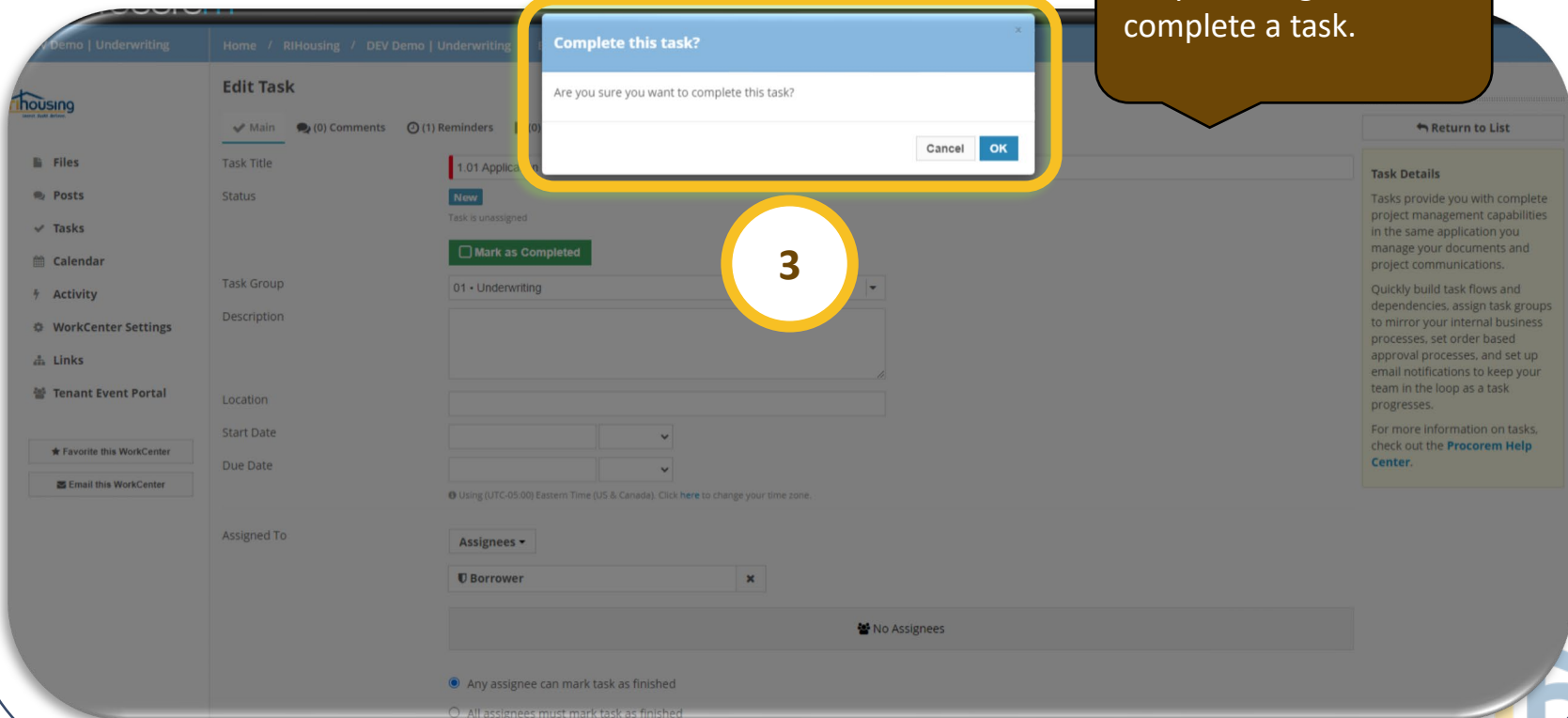


Completing Tasks | Option 2

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

1.01 Application

New

Task is unassigned

01 - Underwriting

Assigned To

Assignees

Borrower

No Assignees

Any assignee can mark task as finished

All assignees must mark task as finished

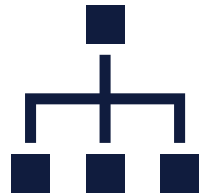
Task Details

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.

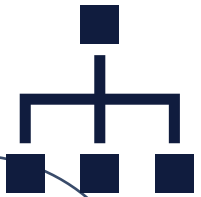
For more information on tasks, check out the [Procorem Help Center](#).





Links

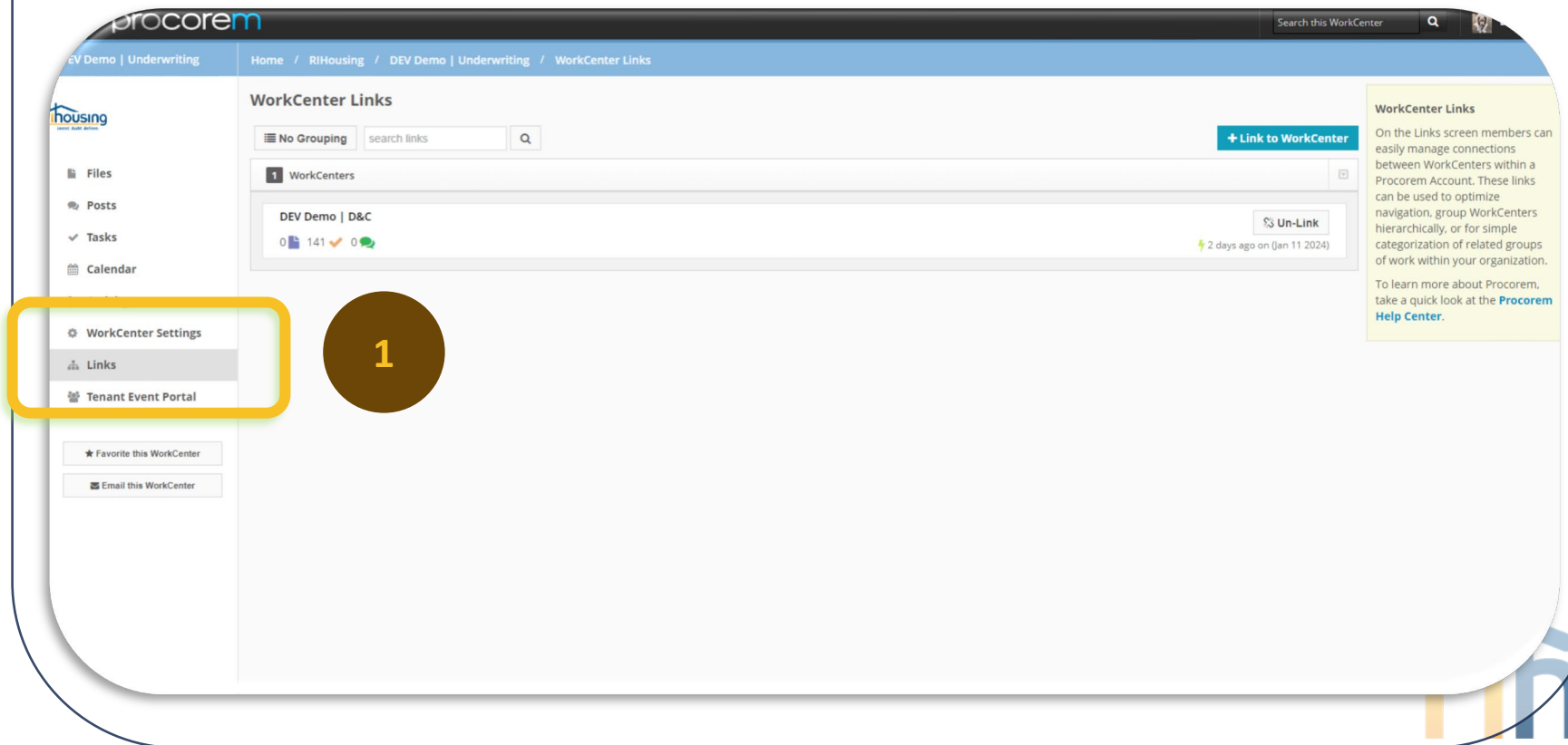




Links

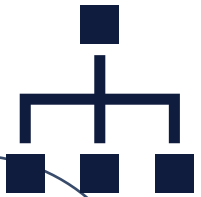
1

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 navigation menu with the following items: Files, Posts, Tasks, Calendar, WorkCenter Settings, Links, and Tenant Event Portal. The 'Links' option is highlighted with a yellow box and a large brown circle containing the number '1'. The main content area is titled 'WorkCenter Links' and features a search bar, a '+ Link to WorkCenter' button, and a list of workcenters. The first entry is 'DEV Demo | D&C', which includes a status bar with '0' documents, '141' likes, and '0' messages, along with an 'Un-Link' button and a timestamp of '2 days ago on (Jan 11 2024)'. A yellow callout box on the right side of the interface provides information about WorkCenter Links, stating that members can manage connections between workcenters to optimize navigation and categorization. It also includes a link to the Procorem Help Center.

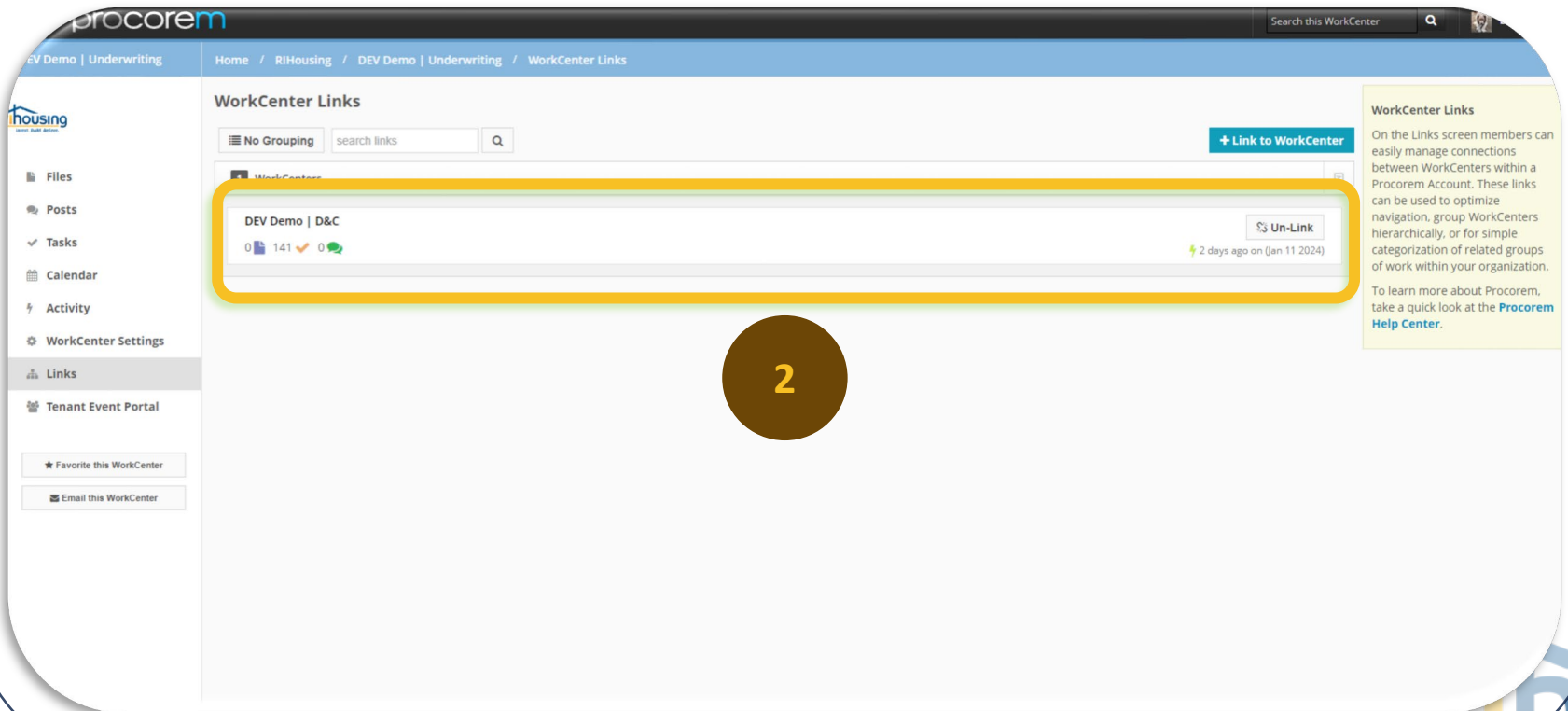
1



Links

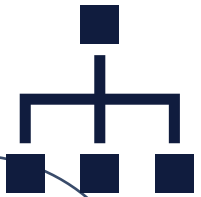
2

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 for links and a "+ Link to WorkCenter" button. A list of links is displayed, with one link highlighted by a yellow box: "DEV Demo | D&C". This link has 0 documents, 141 likes, and 0 comments. It was updated 2 days ago on Jan 11 2024. There is an "Un-Link" button 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 right-hand panel titled "WorkCenter Links" provides an explanation of the feature and a link to the Procorem Help Center. A large brown circle with the number "2" is overlaid on the bottom center of the screenshot.

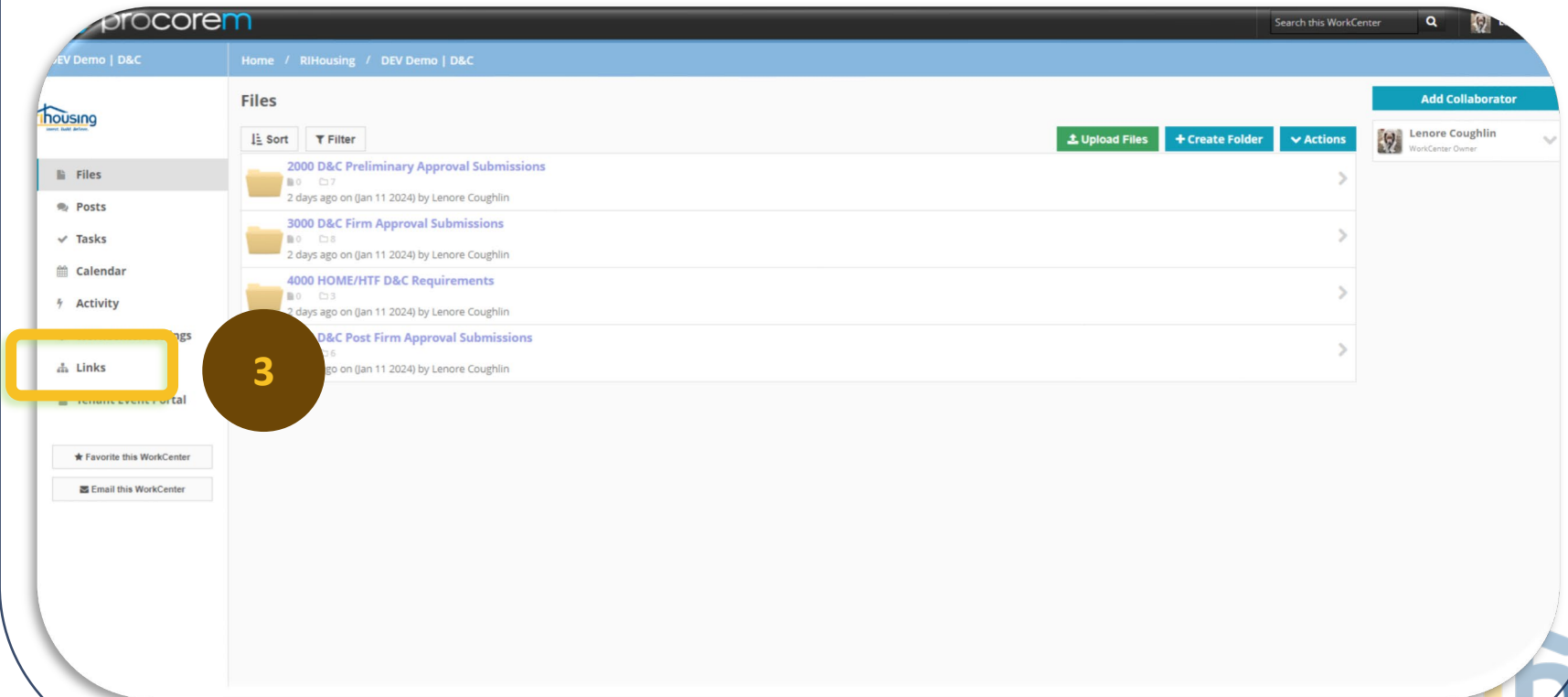
2



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 of items, and a timestamp. The right sidebar shows the "Add Collaborator" section with a dropdown menu for "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.

A green rectangular button with a white upward-pointing arrow icon on the left and the text "Import Tenant Events" in white.

Manual Entry

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

A blue rectangular button with a white plus sign icon on the left and the text "Add Tenant Event" in white.

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 10th 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

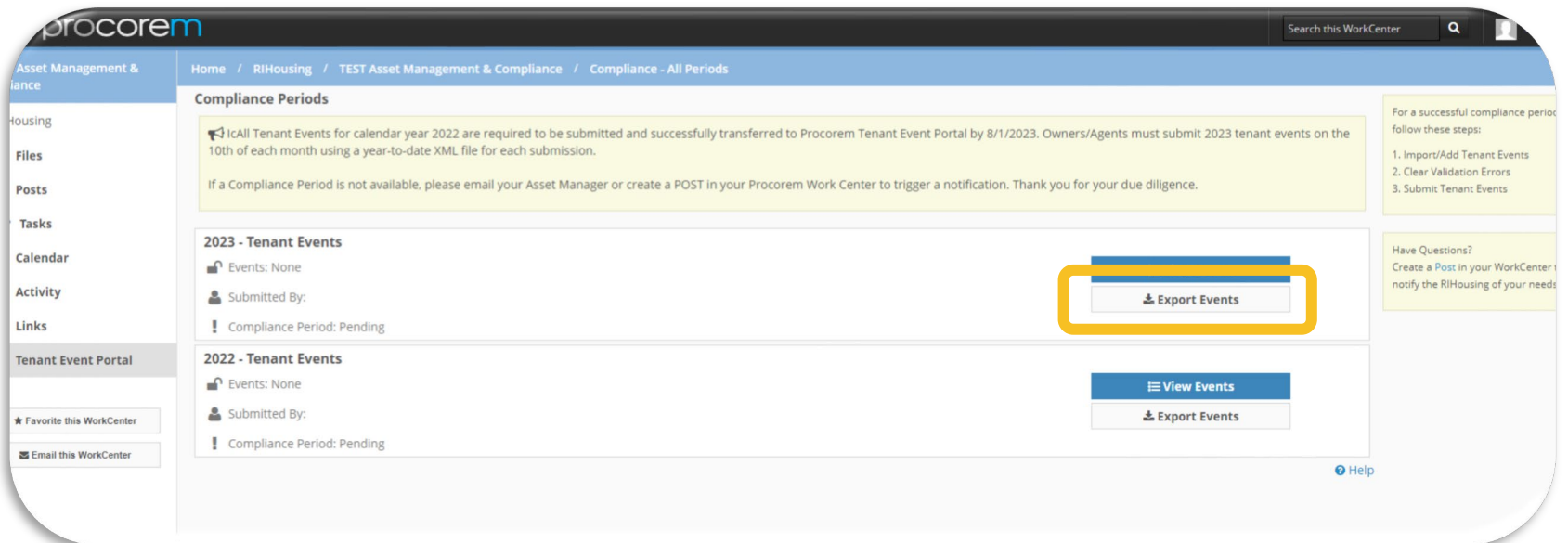
- Enter all tenant events that have taken place since the last update.
- Mark associated Tasks as Complete
- If there were no changes since the last upload, use the Comment option in the Tasks to communicate with your Asset Manager

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.



Asset Management & Compliance

Home / RI Housing / TEST Asset Management & Compliance / Compliance - All Periods

Compliance Periods

⚠️ 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.

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 RI Housing of your needs

2023 - Tenant Events

- Events: None
- Submitted By:
- Compliance Period: Pending

Export Events

2022 - Tenant Events

- Events: None
- Submitted By:
- Compliance Period: Pending

View Events

Export Events

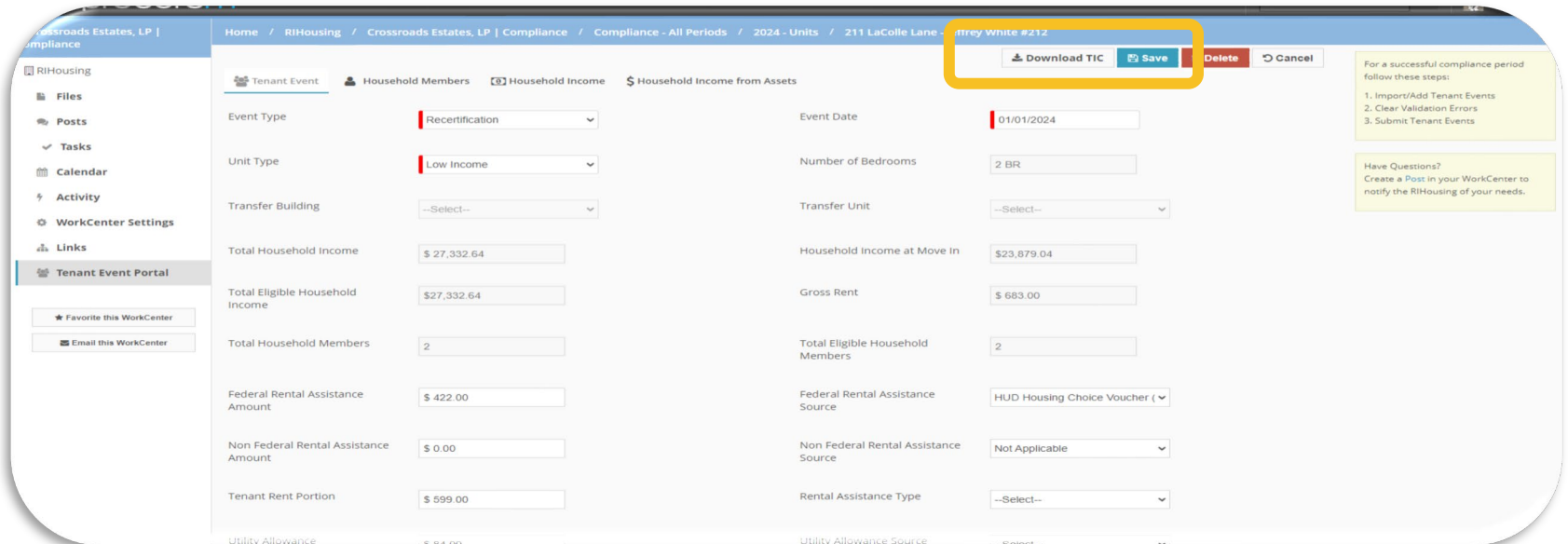
Help

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



The screenshot displays the Procorem Tenant Event Portal interface. The breadcrumb trail at the top reads: Home / RIHousing / Crossroads Estates, LP | Compliance / Compliance - All Periods / 2024 - Units / 211 LaColle Lane - Grey White #212. The 'Download TIC' button is highlighted with a yellow box. 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--



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



Contact Information

Michael DiChiaro, *Director Leased Housing and Rental Services*

401-457-1274 mdichiaro@rihousing.com

Hope Lanphear, *Assistant Director Leased Housing and Rental Services*

401-429-1409 hlanphear@rihousing.com

Kathleen Millerick, *Rental Compliance/Training Coordinator*

401-457-1241 kmillerick@rihousing.com

Brittany Toomey, *MF Housing Compliance Manager*

401-429-1455 btoomey@rihousing.com

Lenore Coughlin, *MF Business Solutions Manager*

401-457-1258 lcoughlin@rihousing.com



Contact Information *(cont.)*

Glen Turner, *Senior Asset Manager, MF Compliance*

401-457-1154 gturner@rihousing.com

Lillian Morel, *Senior Asset Manager, MF Compliance*

401-429-1472 lmorel@rihousing.com

Kristi Richardson, *Compliance Support Specialist, MF Compliance*

401-450-1307 krichardson@rihousing.com

Jesus Diaz, *Asset Manager, MF Compliance*

401-457-1233 jdiaz@rihousing.com

Leslie Silva, *Asset Manager, MF Compliance*

401-450-1329 lsilva@rihousing.com



Contact Information *(cont.)*

Richelle FitzGerald, *Senior Program Representative, MF Compliance*

401-457-1227 rfitzgerald@rihousing.com

Adriana De La Cruz, *Asset Manager, MF Compliance*

401-457-1238 adelacruz@rihousing.com

Vanessa Teodovich, *Asset Manager, MF Compliance*

401-457-1226 vteodovich@rihousing.com

Luis Matos, *Asset Manager, MF Compliance*

401-450-1343 lmatos@rihousing.com

Amanda O'Brien, *Asset Manager, MF Ancillary Programs*

401-450-1383 aobrien@rihousing.com

Charlie Chhum, *Program Representative, MF Compliance*

401-457-1176 cchum@rihousing.com



Contact Information *(cont.)*

Susan Halloran, *Manager MF Financial Assets*

401-450-1339 shalloran@rihousing.com

Joanna Suriel, *MF Financial Officer*

401-450-1337 jsuriel@rihousing.com

Jhavel Higgins, *MF Financial Officer*

401-443-1664 jhiggins@rihousing.com

