



# Welcome to Procorem!



**August 31, 2023**

An introduction for owners and management agents of multifamily developments with Asset Management and Compliance oversight by RI Housing with a focus on Tenant Event Updates





## **RIHousing has partnered with ProLink Solutions for the purpose of monitoring multifamily developments**

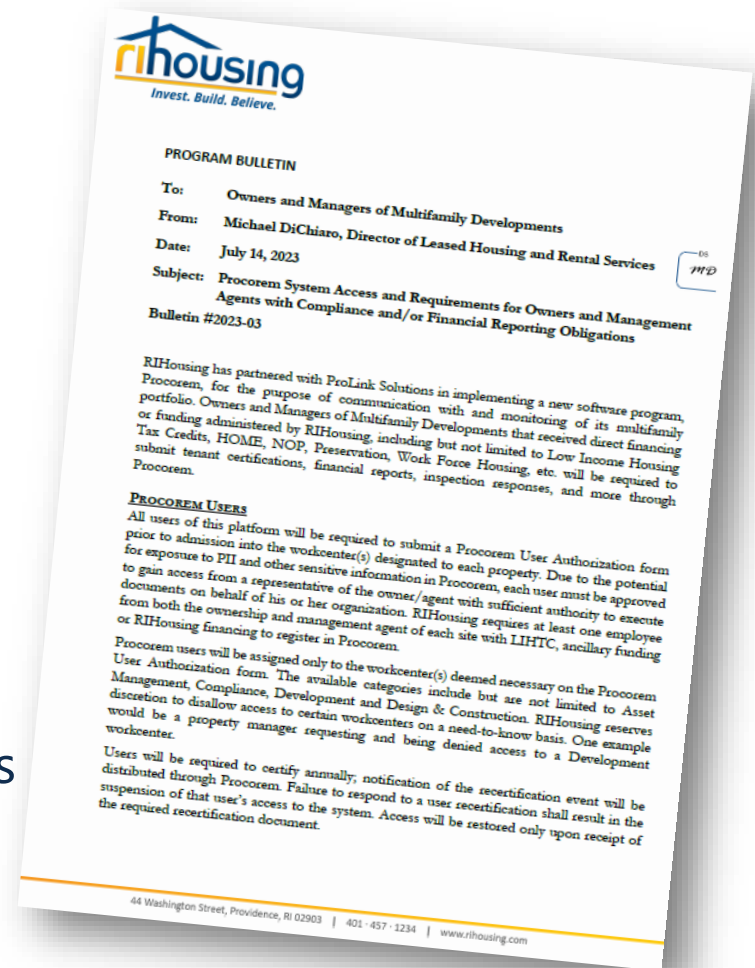
- RIHousing Asset Management staff will be using ProLink going forward
  - LIHTC Compliance
  - Ancillary Compliance
  - Financial reporting
- Owners and management agents will access  [procore](#)





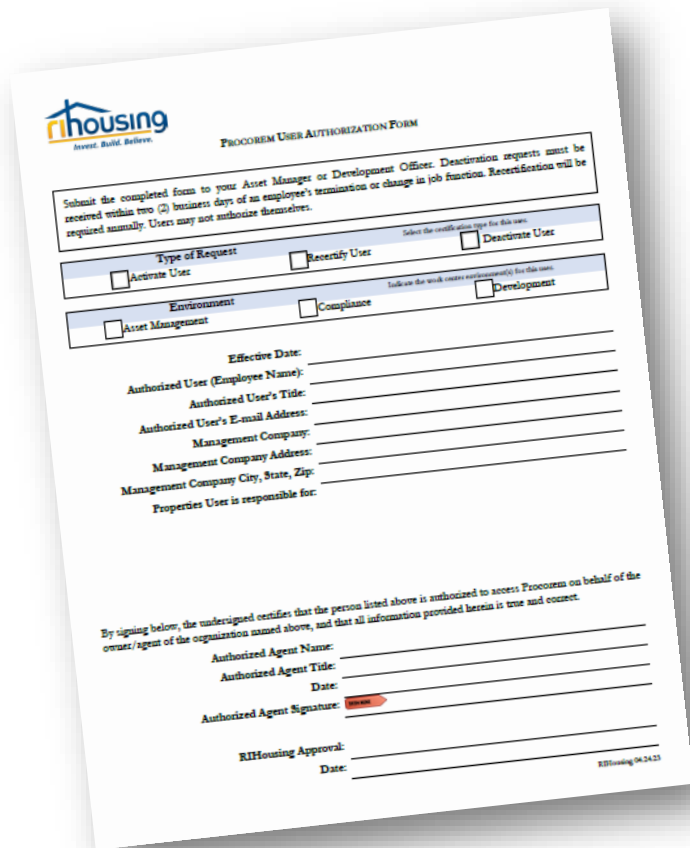
## Program Bulletin #2023-03 circulated on July 14, 2023

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



## Procorem Users

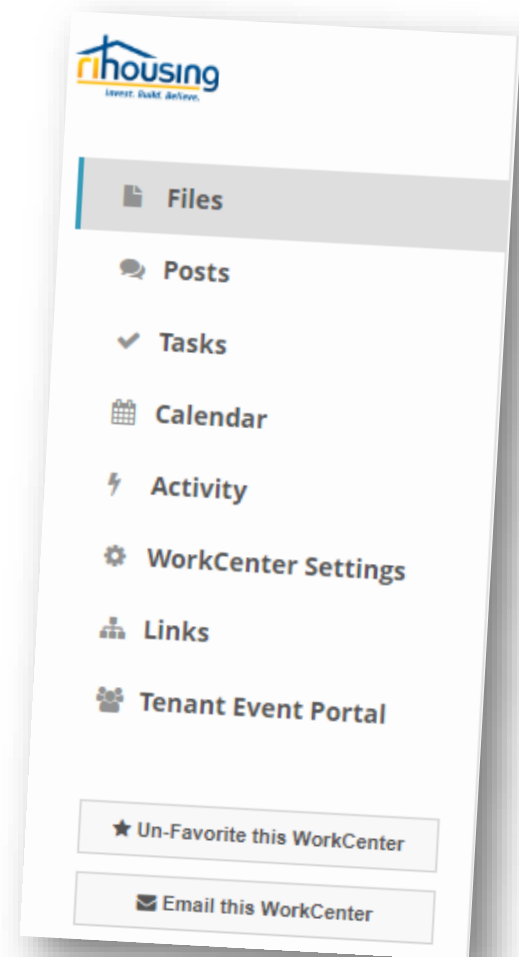
- All users are required to submit a Procorem User Authorization form
- At least one employee from ownership and management agent of each site
  - LIHTC
  - Ancillary funding
  - RIHousing financing
- Users will be recertified annually

The form is titled "PROCOREM USER AUTHORIZATION FORM" and includes the RIHousing logo. It contains instructions, a "Type of Request" section with checkboxes for "Activate User", "Recertify User", and "Deactivate User", and an "Environment" section with checkboxes for "Asset Management", "Compliance", and "Development". Below these are fields for "Effective Date", "Authorized User (Employee Name)", "Authorized User's Title", "Authorized User's E-mail Address", "Management Company", "Management Company Address", "Management Company City, State, Zip", and "Properties User is responsible for". A signature line for the "Authorized Agent" is also present, along with a "RIHousing Approval" section and a date field. A small reference number "RIHousing 04.24.13" is visible at the bottom right of the form.



## Procorem Workcenters

- User-friendly
- Site-specific
  - Upload tenant events
  - Submit documents and reports
  - Provide tenant files for review
- System-generated reminders
- Transparency
  - Site documents will be available
    - Regulatory Agreement
    - LURA
    - Other agreements





## Tenant Events

- Procorem is replacing WTC
- Due by the 10<sup>th</sup> of the month
  - Sites capable of generating XML file must upload a year-to-date XML file monthly
    - NAHMA XML Standard 4.0, 5.0, or 6.0
  - Manual entry of tenant events required for sites without the ability to upload
- Submit only after all certs for the compliance year have been captured
  - If the submit button is clicked, please notify your Asset Manager to unlock the tenant event update
- Straight PBCA sites without RIHousing, LIHTC, or ancillary funding layer are exempt for now

*Upload YTD monthly*

### 2023 - Tenant Events

🔒 Events: None

👤 Submitted By:

⚠️ Compliance Period: Pending

### 2022 - Tenant Events

🔒 Events: None

👤 Submitted By:

⚠️ Compliance Period: Pending

**Due September 15, 2023**



## 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.



## Asset Management

- Separate workcenter from Compliance
- Will replace e-mail boxes currently used
- Standardized Templates
- Efficient and secure submission
- Improved communications
- Deadline reminders





## Multifamily Inspections & File Reviews

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- RIHousing offers the option of a remote file review
  - Partners will be allowed the same choice in Procorem
  - PBCA sites with no further multifamily funding will remain in SharePoint until further notice
- Procorem will deliver notifications and findings
  - Cuts down on e-mail and centralizes correspondence

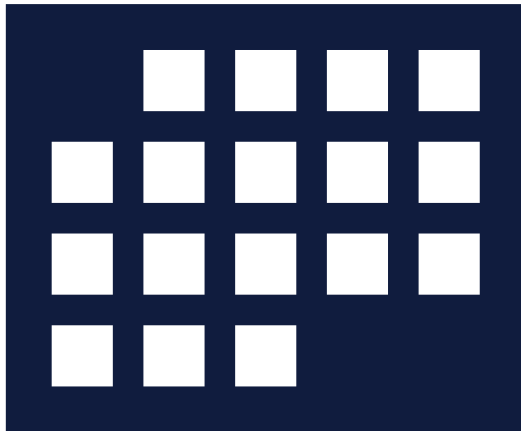
## Owner's Certifications

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- Procorem will distribute and serve as the collection center for annual owner's certifications
  - The task category exists in the compliance workcenter but will be built toward the end of 2023



## Deadlines



**September 1, 2023**

Register in Procorem

**September 15, 2023**

2022 Tenant Events in Procorem

**October 1, 2023**

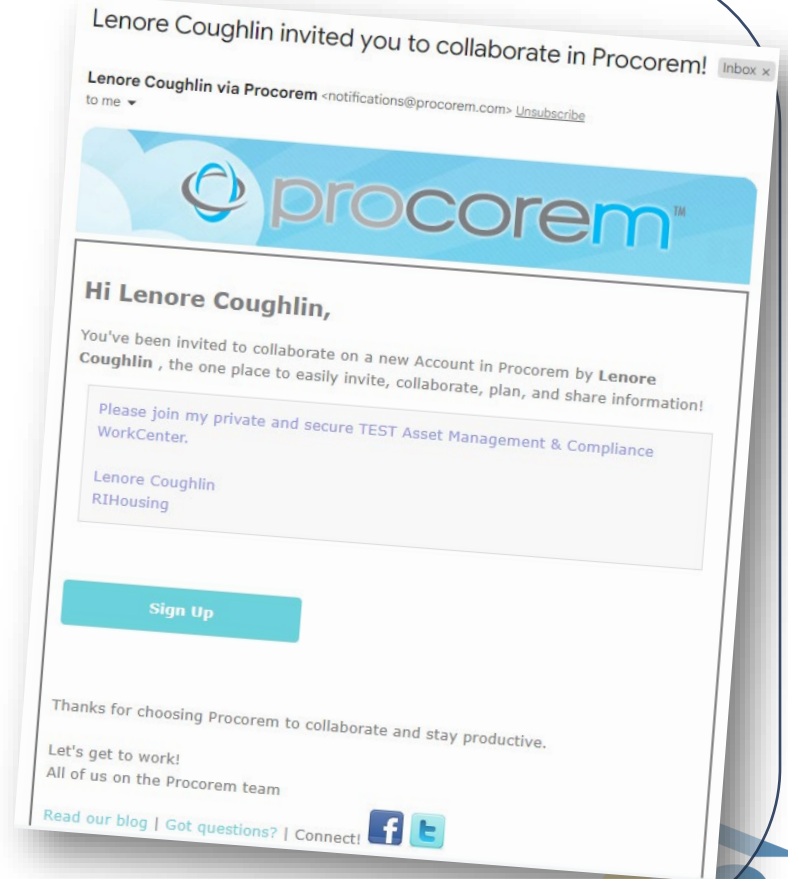
LIHTC properties begin  
submitting monthly tenant events  
in Procorem

## Workcenter Invitations

When a RIHousing employee invites an external user to a workcenter, a notification is sent to that user's e-mail address.

This example focuses on a first-time user's perspective of the signup procedure.

 Click **Sign Up**



## Sign Up

The Sign Up button opens the link in an internet browser; another verification e-mail will be sent after you finish signing up.

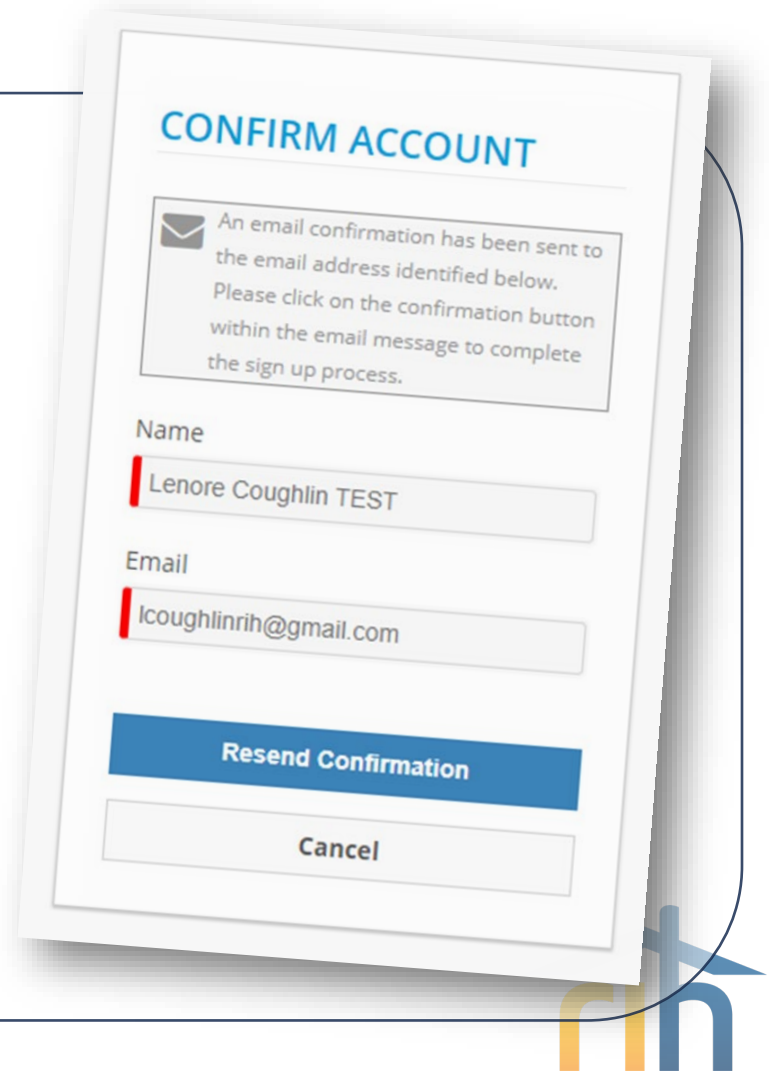
- 🌀 Enter your **First Name**
- 🌀 Enter your **Last Name**
- 🌀 Create a secure **Password** using the criteria in the window
  - No spaces
  - At least 1 number
  - At least 1 capital letter
  - At least 1 lowercase letter
  - At least 8 characters long



## Check your E-mail

You're almost done! When you see this screen that's your queue to check your e-mail for the final step.

 **Check your e-mail**



**CONFIRM ACCOUNT**

 An email confirmation has been sent to the email address identified below. Please click on the confirmation button within the email message to complete the sign up process.

Name

Email

**Resend Confirmation**

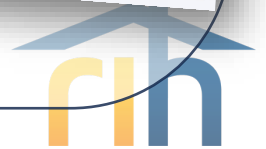
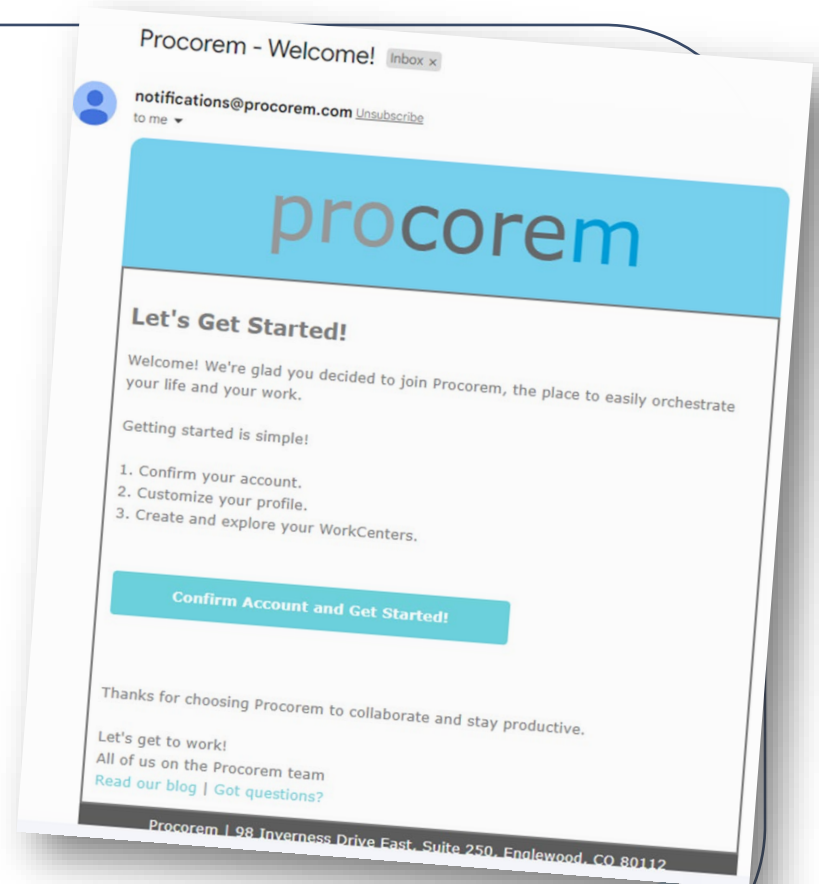
Cancel



## Confirm your Account

All that's left to do is confirm your account before you sign into Procorem.

 Click **Confirm Account and Get Started!**



## Didn't Get Your Invite?

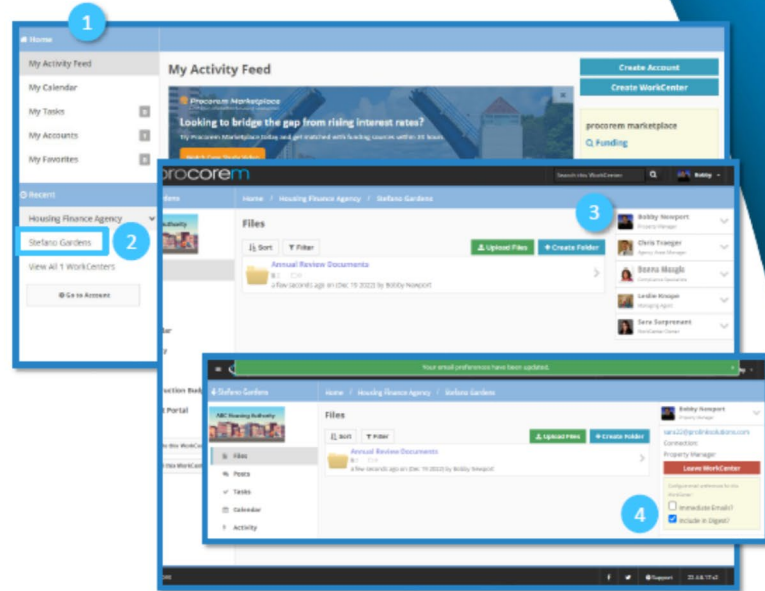
- Check your junk mail
- Contact your IT Department
- Contact Procorem System Admin to confirm your e-mail address





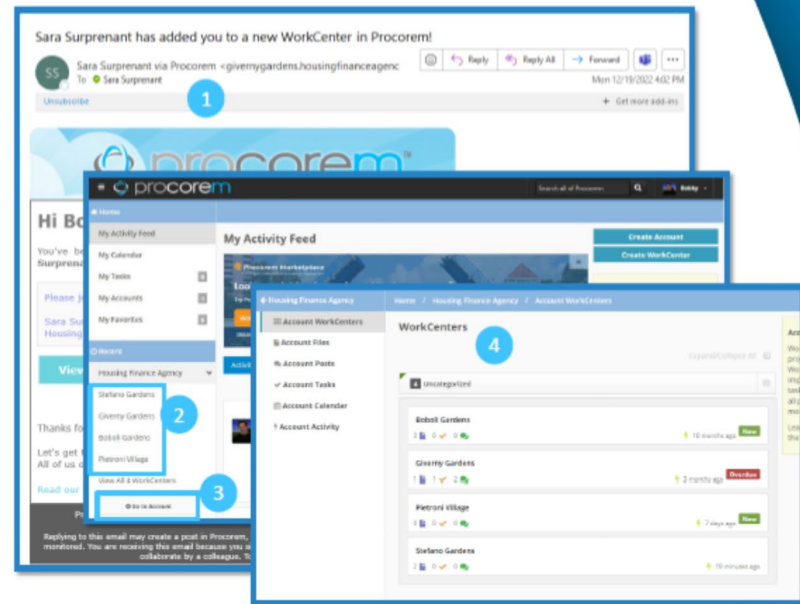
## Invitation to Procorem

- 1 After clicking **Sign Up Now**, you'll be taken to the **Procorem Home** page.
- 2 On the left, you'll see the name of the **Agency** and the **WorkCenter** representing your property. Click on the name of the **WorkCenter** to access the **WorkCenter**.
- 3 Note other collaborators on the **WorkCenter**, including **Agency** contacts.
- 4 **Procorem** emails notifications in real time for file, post, and **WorkCenter** activities – if you'd like to receive one daily digest email instead of immediate emails, click the down arrow next to your name and deselect **Immediate Emails**.



## Invitation to Procorem

- 1 Once you've created your account, you'll receive an email invitation for each **WorkCenter** you've been added to.
- 2 When you log in to Procorem, you'll see your **WorkCenter(s)** in the left nav panel.
- 3 To view all your **WorkCenters**, click on **Go To Account**.
- 4 If you don't have access to a needed **WorkCenter**, contact the **Agency** directly to request access.





Files



Posts



Tasks



Calendar



Activity



Links



Tenant Event Portal

## Files

Each property will have nearly identical file structures unique to their property funding and compliance layers. Site-specific legal and recorded documents such as the Regulatory Agreement, LURA, 8609(s), etc. will be available in Procorem. If they are not yet available when you explore your workcenter, please be patient while we perform our processes to upload these items. When submitting a document for a task, the file path will be identified in the Location field.





Files



Posts



Tasks



Calendar



Activity



Links



Tenant Event Portal

## Posts

Communicate with your Asset Manager directly through Procorem using the Posts feature. Each Compliance workcenter comes with a default post directing users to ProLink's online training featuring tenant events and all of the available help center resources to guide you along the way.





Files



Posts



Tasks



Calendar



Activity



Links



Tenant Event Portal

## Tasks

A Procorem workcenter may be built to remind users of upcoming deadlines and reminders of past due deadlines with built-in tasks.

When submitting a document for a task, the file path where the item should be stored will be identified within the Location field within a task.

You can mark tasks as completed;  
RIHousing staff may approve tasks.





Files



Posts



Tasks



**Calendar**



Activity



Links



Tenant Event Portal

## Calendar

Tasks with dates assigned to them will be reflected on the calendar in a workcenter.

The beginning date of the task, end date of the task, and all dates in between will be highlighted.





Files



Posts



Tasks



Calendar



Activity



Links



Tenant Event Portal

## Activity

Shows you what you may have missed. Entries are logged for each task completed, file uploaded, file downloaded, etc.

Your e-mail notifications should look similar to what you see in the Activity section of Procorem.





Files



Posts



Tasks



Calendar



Activity



Links



Tenant Event Portal

## Links

Not applicable to all workcenters. If there is only one workcenter for a property, it will not have any links.

Remember, some sites have both an Asset Management workcenter and a Compliance workcenter; those will be linked.

Permission settings and the completed Procorem User Authorization form will determine whether you have access to any linked workcenters.







Files



Posts



Tasks



Calendar



Activity



Links



Tenant Event Portal

## Tenant Event Portal

Available only in Compliance workcenters, this portal is where tenant events must be uploaded by the 10<sup>th</sup> of each month.





# 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 and the text "Import Tenant Events".

↑ Import Tenant Events

### Manual Entry

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

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

+ 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

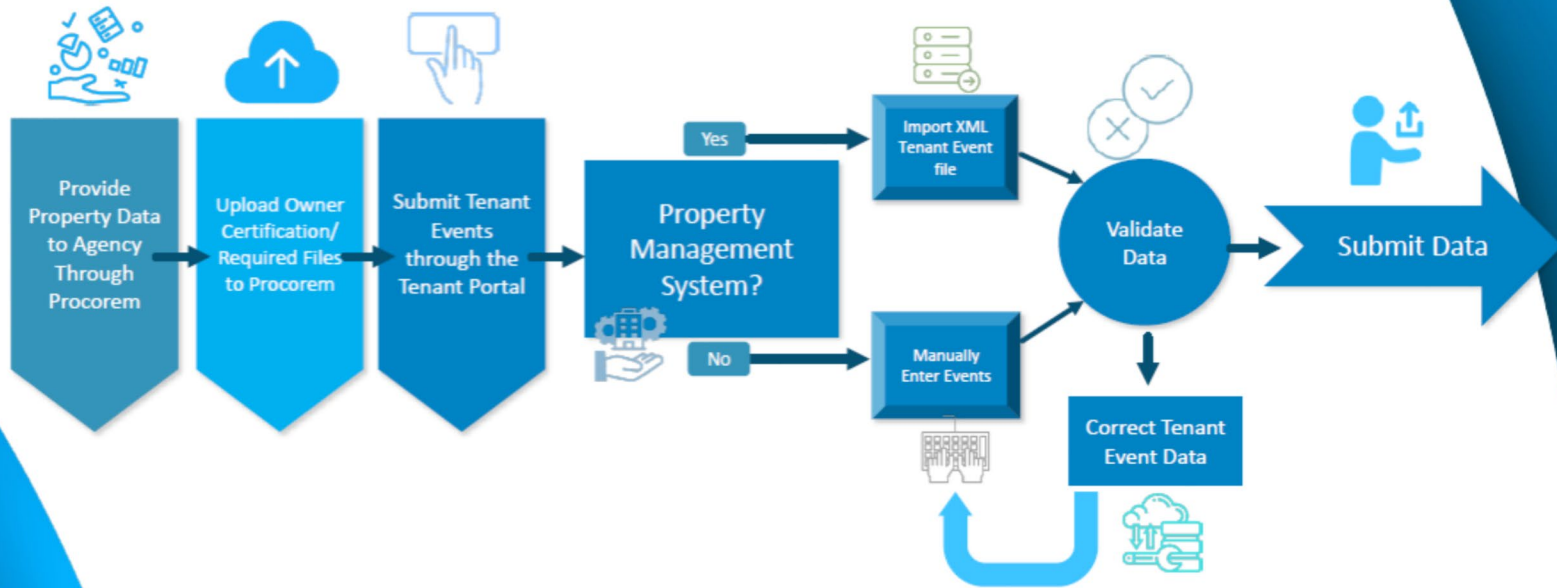
### Manual Entry

- 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.*



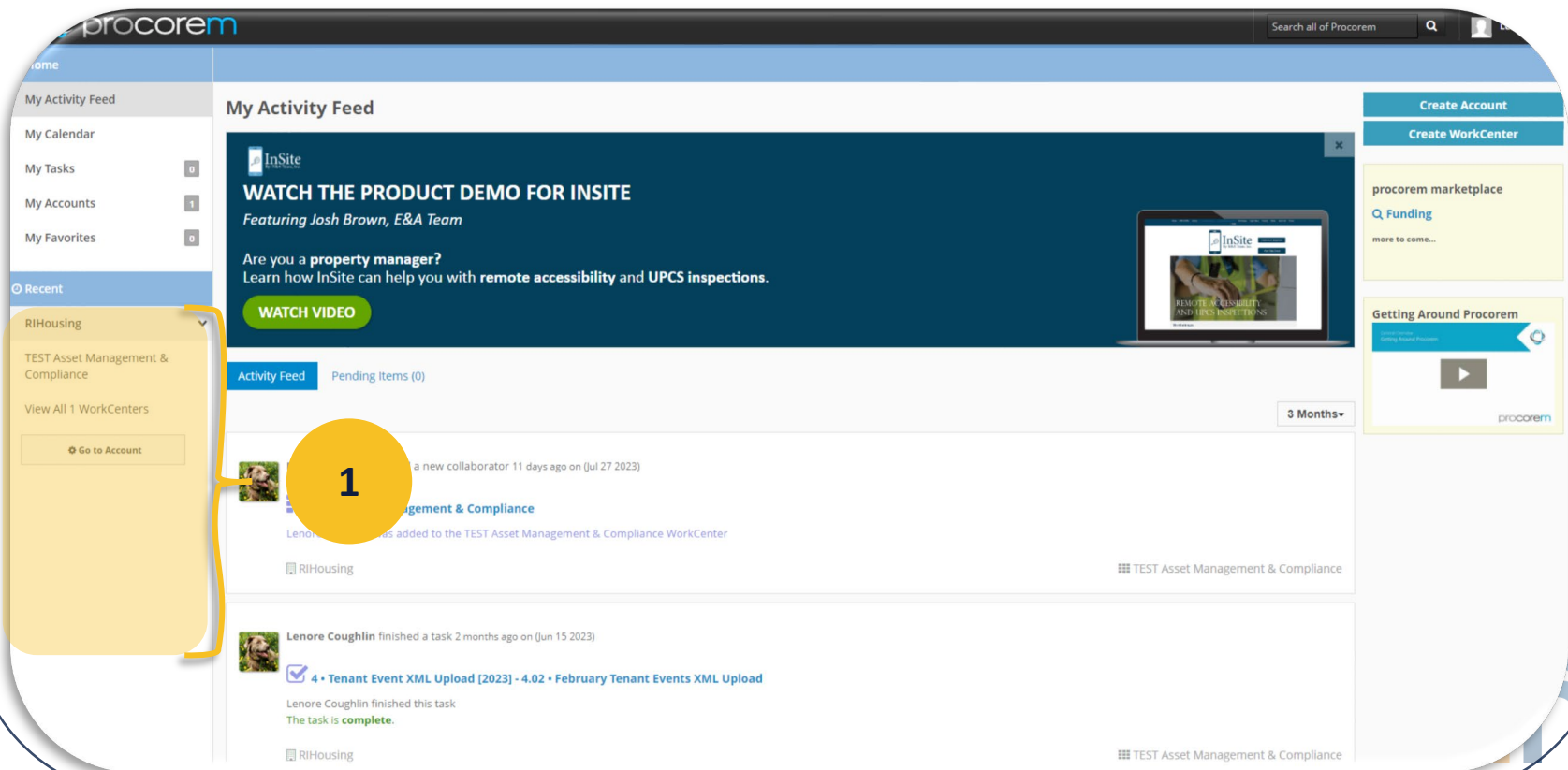
## Using the Tenant Portal



## Accessing the Tenant Portal

1

Log into Procorem and select the desired workcenter.

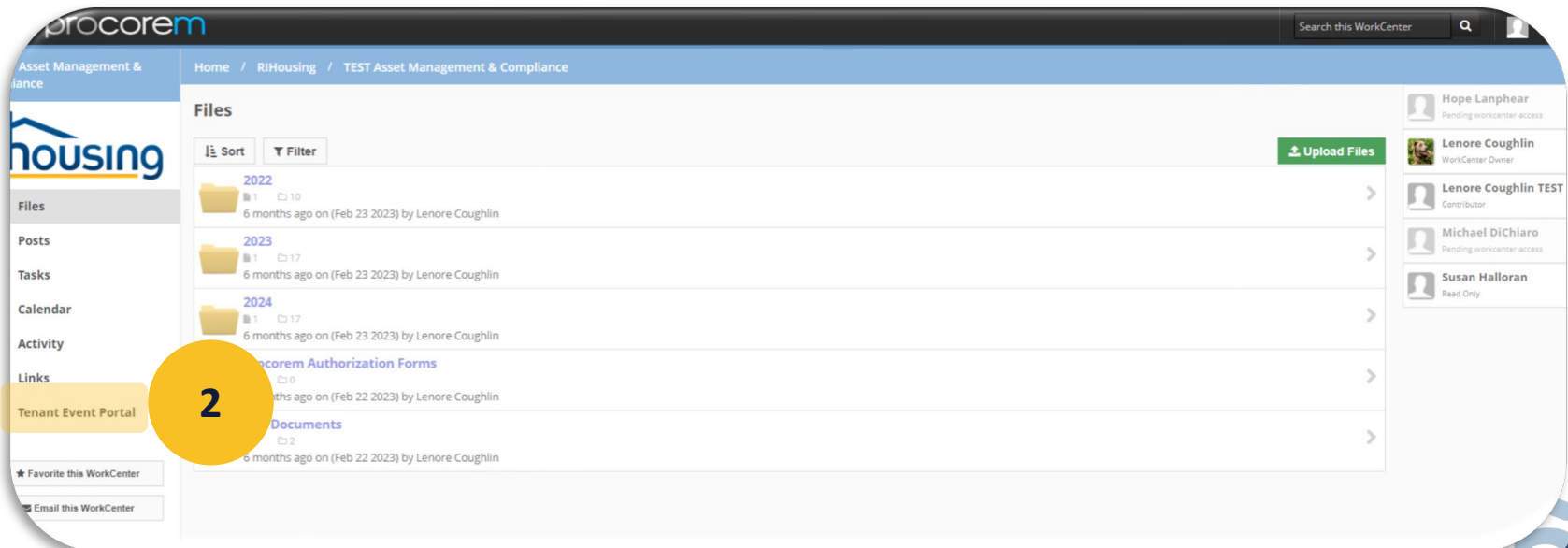


The screenshot shows the Procorem tenant portal interface. The navigation menu on the left includes 'My Activity Feed', 'My Calendar', 'My Tasks', 'My Accounts', and 'My Favorites'. A yellow callout box highlights the 'Go to Account' button in the 'Recent' section. The main content area displays 'My Activity Feed' with a featured banner for 'WATCH THE PRODUCT DEMO FOR INSITE' and a list of activity items. A yellow circle with the number '1' is placed over the first activity item, which is 'Lenore Coughlin finished a task 2 months ago on (Jun 15 2023)'. The right sidebar contains links for 'Create Account', 'Create WorkCenter', 'procorem marketplace', 'Funding', and 'Getting Around Procorem'.

## Accessing the Tenant Portal

2

The **Tenant Event Portal** is accessed via the left navigation panel on the selected workcenter. Click on the **Tenant Event Portal** menu item to navigate to the **Compliance Periods** for the workcenter/property.

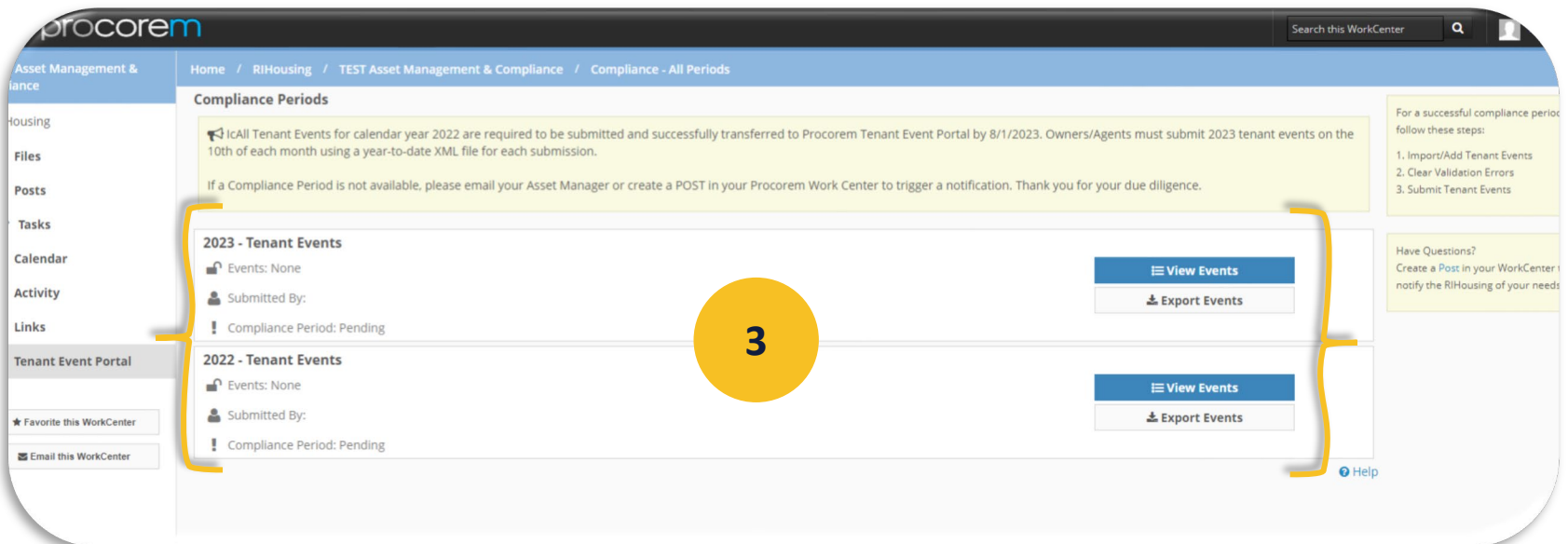


The screenshot displays the Procorem Tenant Event Portal interface. The breadcrumb navigation at the top reads "Home / RI Housing / TEST Asset Management & Compliance". The left navigation panel includes "Files", "Posts", "Tasks", "Calendar", "Activity", "Links", and "Tenant Event Portal", with the latter highlighted in yellow. A yellow circle with the number "2" is overlaid on the "Tenant Event Portal" menu item. The main content area shows a "Files" section with folders for the years 2022, 2023, and 2024, each containing one file and dated "6 months ago on (Feb 23 2023) by Lenore Coughlin". Below the folders are sections for "Procorem Authorization Forms" (0 files) and "Documents" (2 files), both also dated "6 months ago on (Feb 22 2023) by Lenore Coughlin". The right sidebar shows a user profile for "Hope Lanphear" (Pending workcenter access) and a list of other users: "Lenore Coughlin" (WorkCenter Owner), "Lenore Coughlin TEST" (Contributor), "Michael DiChiaro" (Pending workcenter access), and "Susan Halloran" (Read Only). A search bar at the top right is labeled "Search this WorkCenter".

## Accessing the Tenant Portal

3

Select the **View Events** button for the **Compliance Year** you're working on. Best practice is to work from oldest to newest.



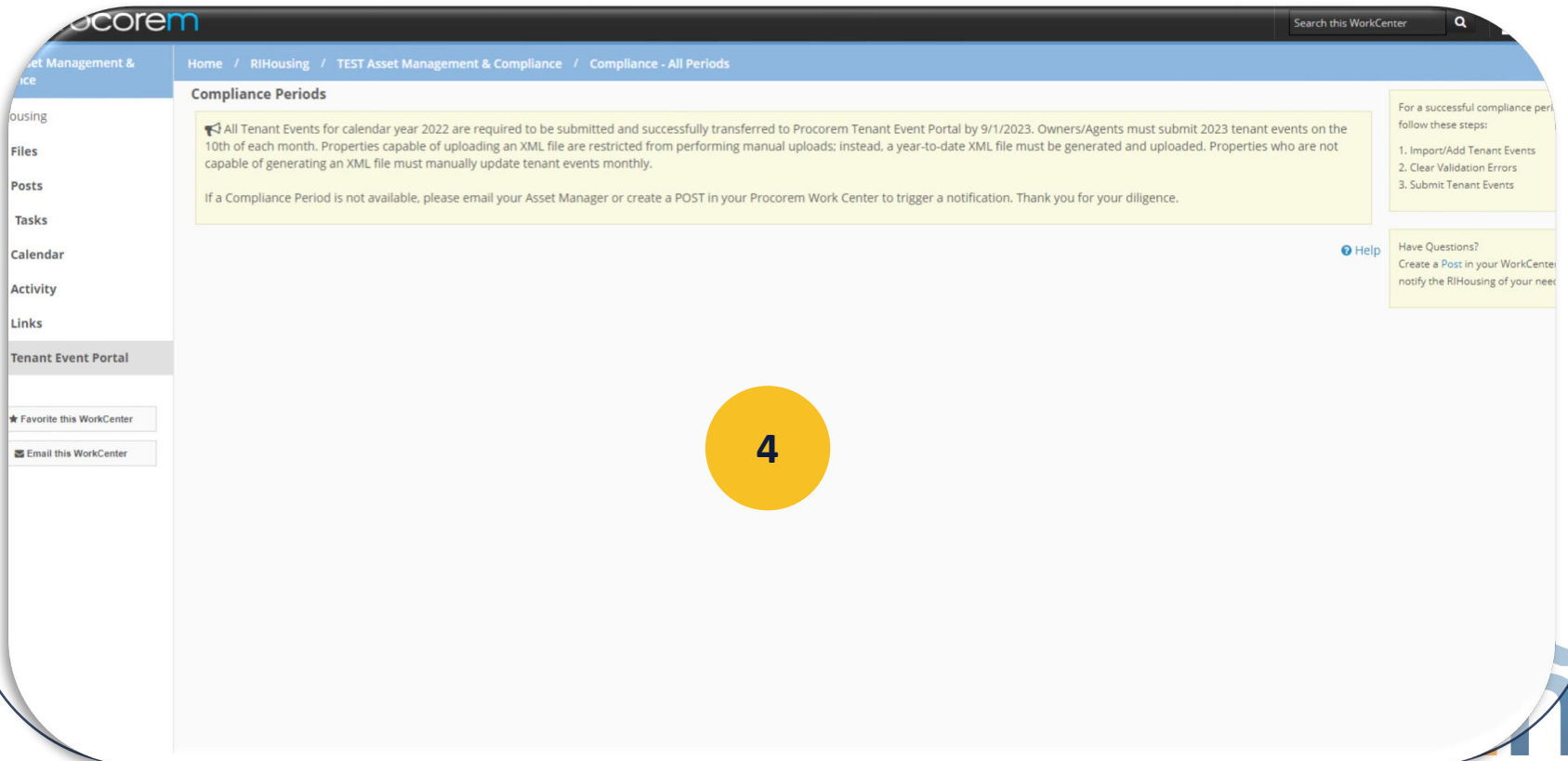
The screenshot displays the Procorem Tenant Portal interface. The breadcrumb navigation shows: Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods. The main content area is titled "Compliance Periods" and contains a yellow notification box with the following text: "All Tenant 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:" (with a user icon), and "Compliance Period: Pending". To the right of each section are two buttons: "View Events" and "Export Events". A large yellow circle with the number "3" is overlaid on the "View Events" button for the 2022 section. On the right side of the interface, there are two informational boxes: one for successful compliance steps (Import/Add Tenant Events, Clear Validation Errors, Submit Tenant Events) and another for help (Have Questions? Create a Post in your WorkCenter to notify the RIHousing of your needs). The left sidebar contains navigation options like Asset Management & Compliance, RIHousing, Files, Posts, Tasks, Calendar, Activity, Links, Tenant Event Portal, Favorite this WorkCenter, and Email this WorkCenter. The Procorem logo is in the top left, and the RIHousing logo is in the bottom right.



## Accessing the Tenant Portal

4

If the **Compliance Periods** page is blank, contact your Asset Manager.

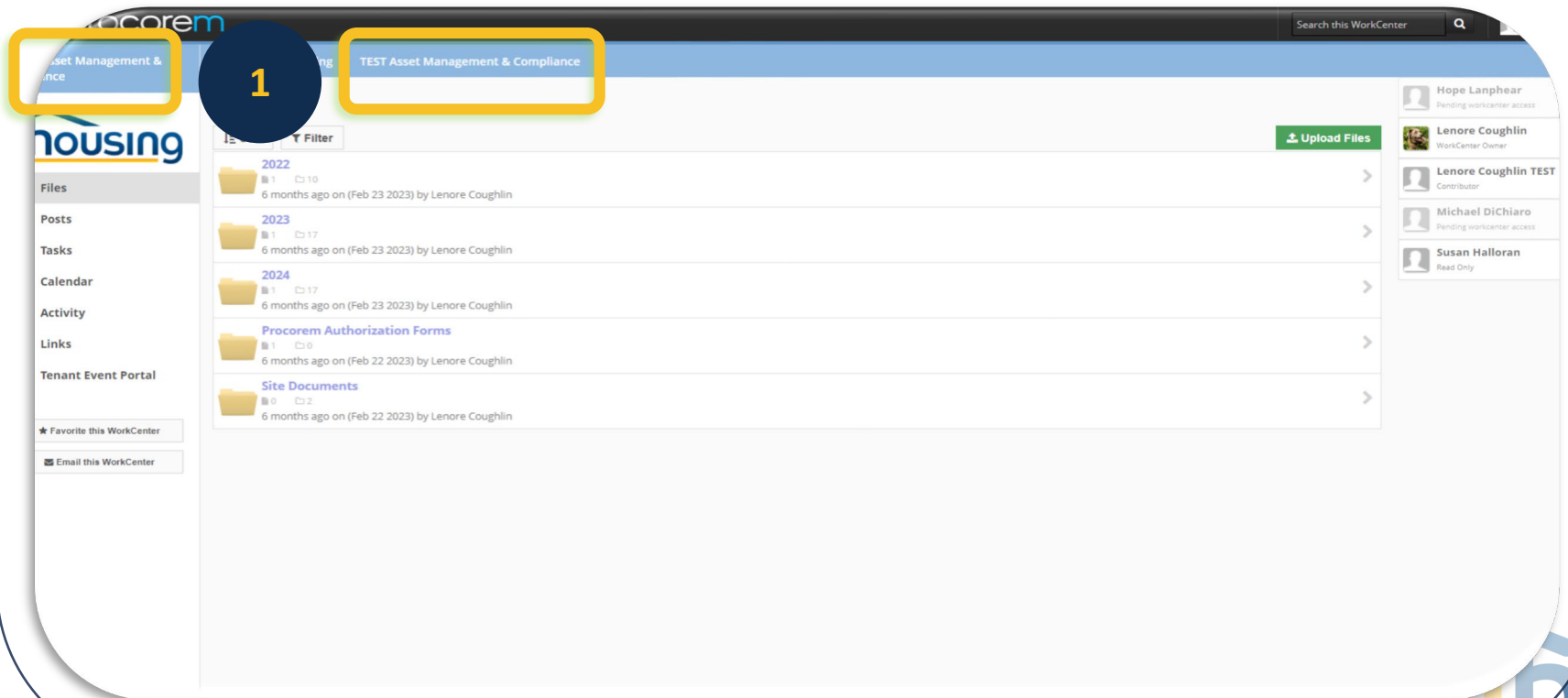


The screenshot shows the Procorem Tenant Portal interface. The breadcrumb trail is: Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods. The main heading is "Compliance Periods". A yellow notification box contains the following text: "All Tenant Events for calendar year 2022 are required to be submitted and successfully transferred to Procorem Tenant Event Portal by 9/1/2023. Owners/Agents must submit 2023 tenant events on the 10th of each month. Properties capable of uploading an XML file are restricted from performing manual uploads; instead, a year-to-date XML file must be generated and uploaded. Properties who are not capable of generating an XML file must manually update tenant events monthly. 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 diligence." To the right, a yellow box lists steps for a successful compliance period: 1. Import/Add Tenant Events, 2. Clear Validation Errors, 3. Submit Tenant Events. Below that, a "Help" link is present with the text: "Have Questions? Create a Post in your WorkCenter to notify the RIHousing of your need". The left sidebar contains navigation options: Asset Management & Compliance, RIHousing, Files, Posts, Tasks, Calendar, Activity, Links, and Tenant Event Portal. At the bottom of the sidebar are buttons for "Favorite this WorkCenter" and "Email this WorkCenter". A large yellow circle with the number "4" is overlaid on the main content area.

## Importing Tenant Events via XML

1

Navigate to the workcenter where you would like to import tenant events



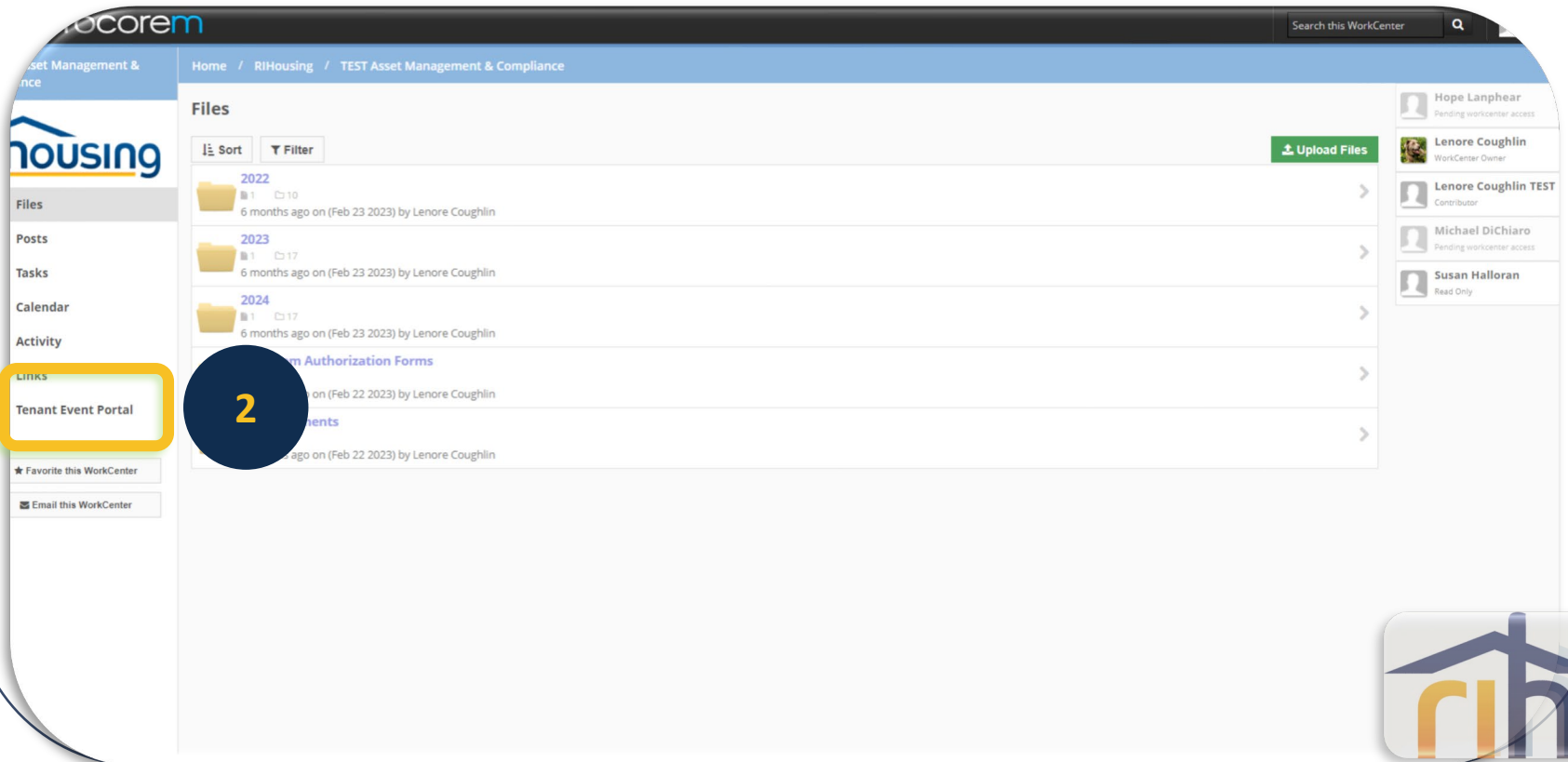
The screenshot displays the Procorem WorkCenter interface. The top navigation bar includes a search box labeled "Search this WorkCenter" and a dropdown menu with "TEST Asset Management & Compliance" selected. A yellow box highlights this menu item, and a blue circle with the number "1" is positioned over it. The main content area shows a list of folders for the years 2022, 2023, and 2024, along with "Procorem Authorization Forms" and "Site Documents". A right-hand sidebar lists users: Hope Lanphear (Pending workcenter access), Lenore Coughlin (WorkCenter Owner), Lenore Coughlin TEST (Contributor), Michael DiChiaro (Pending workcenter access), and Susan Halloran (Read Only). A green "Upload Files" button is visible in the top right of the main content area.

1

## Importing Tenant Events via XML

2

Select the Tenant Portal menu item in the left navigation panel



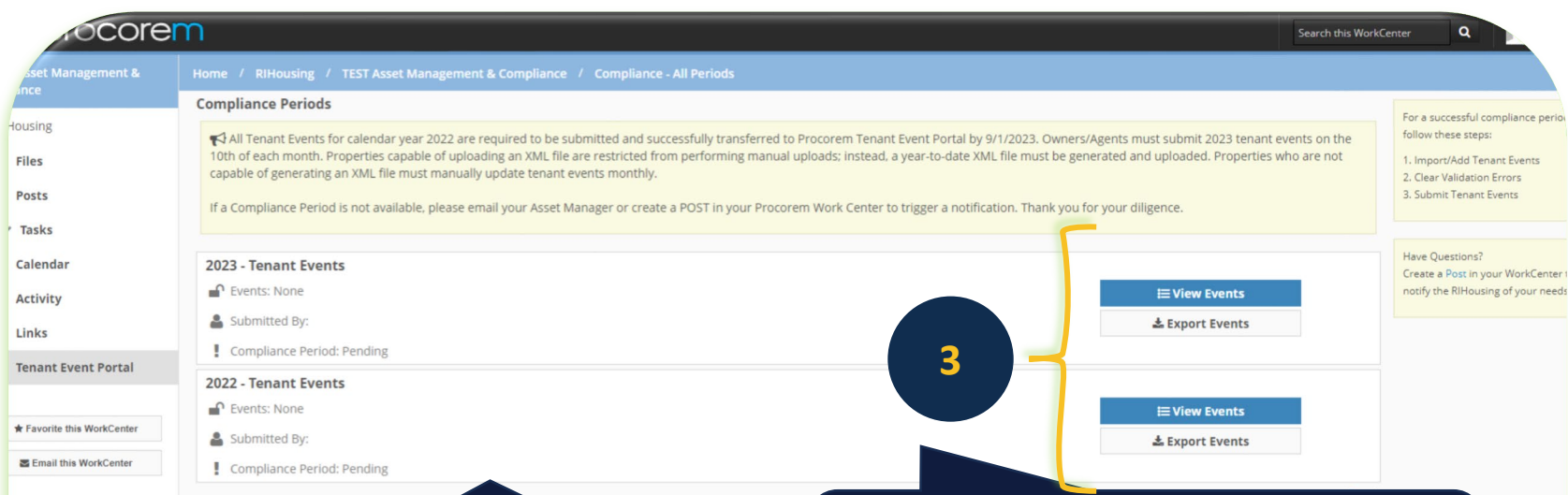
The screenshot displays the Procorem Tenant Portal interface. The left navigation panel is visible, with the 'Tenant Event Portal' menu item highlighted by a yellow box. A dark blue circle with the number '2' is overlaid on the navigation panel. The main content area shows a 'Files' section with a list of folders for the years 2022, 2023, and 2024, each containing a file named 'Tenant Authorization Forms'. The right sidebar shows a list of users, including Hope Lanphear, Lenore Coughlin, Michael DiChiaro, and Susan Halloran. The Procorem logo is visible in the top left corner, and the RIH logo is in the bottom right corner.



## Importing Tenant Events via XML

3

The Compliance Periods screen will display available compliance periods. Select **View Events** for the compliance year you're updating.



The screenshot shows the Procorem interface for the 'Compliance Periods' screen. The breadcrumb trail is 'Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods'. The main content area displays a yellow informational banner with instructions for submitting 2023 tenant events. Below this, there are two sections for '2023 - Tenant Events' and '2022 - Tenant Events'. Each section shows 'Events: None', 'Submitted By:', and 'Compliance Period: Pending'. To the right of each section are 'View Events' and 'Export Events' buttons. A yellow callout box on the right side of the screen lists steps for a successful compliance period: 1. Import/Add Tenant Events, 2. Clear Validation Errors, 3. Submit Tenant Events. A dark blue callout box with the number '3' points to the 'View Events' buttons.

If the **Compliance Periods** page is blank, contact your Asset Manager.

If **Events: Submitted**, you will also be unable to import tenant events.

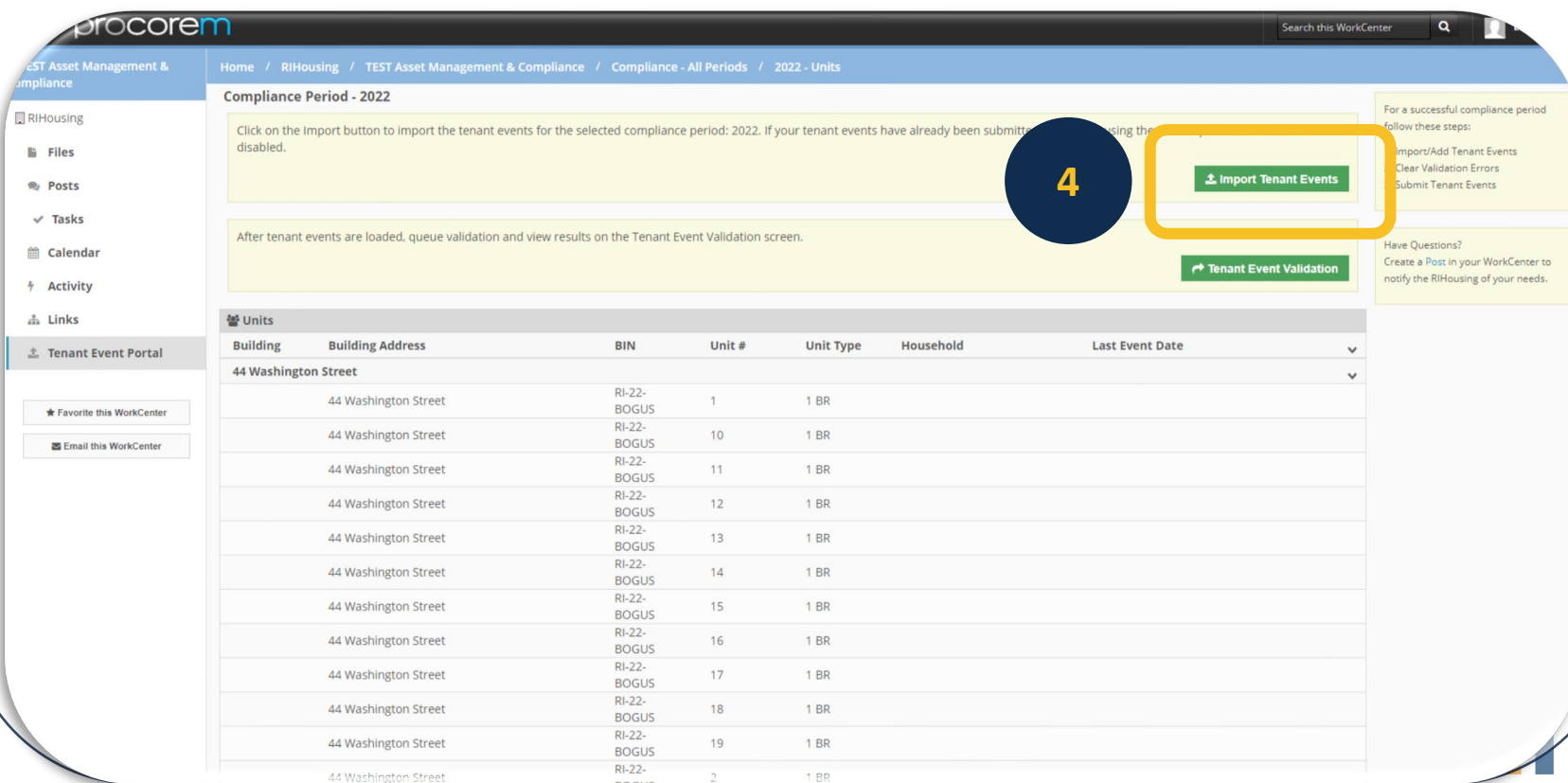
### 2022 - Tenant Events

- 🔒 Events: **Submitted**
- 👤 Submitted By: Coughlin, Lenore
- ⚠️ Compliance Period: Un-finalized

# Importing Tenant Events via XML

4

## Select Import Tenant Events



procorem

Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units

**Compliance Period - 2022**

Click on the Import button to import the tenant events for the selected compliance period: 2022. If your tenant events have already been submitted, the Import button will be disabled.

After tenant events are loaded, queue validation and view results on the Tenant Event Validation screen.

**4** [Import Tenant Events](#)

[Tenant Event Validation](#)

For a successful compliance period follow these steps:  
 Import/Add Tenant Events  
 Clear Validation Errors  
 Submit Tenant Events

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

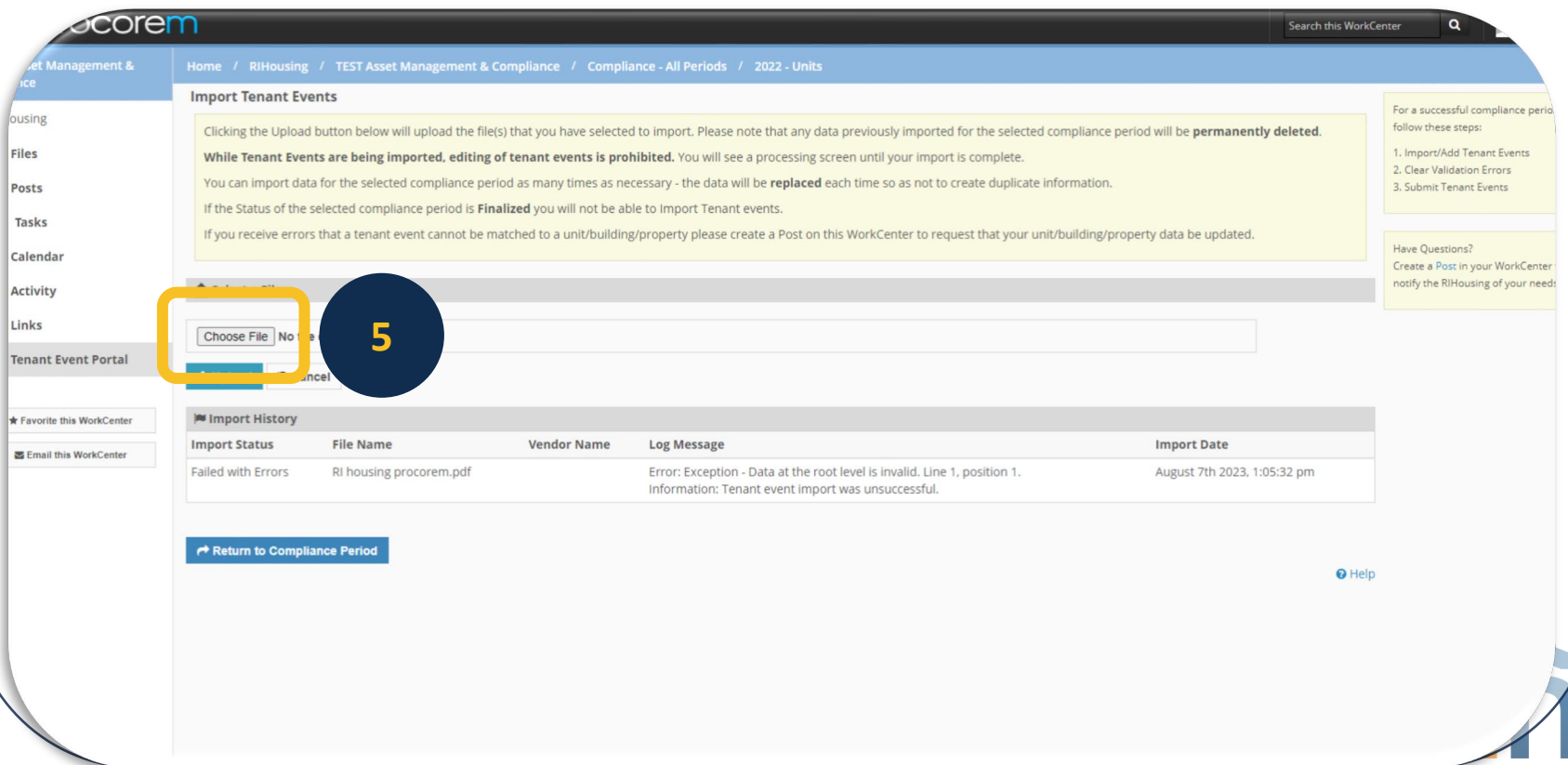
**Units**

| Building                    | Building Address     | BIN         | Unit # | Unit Type | Household | Last Event Date |
|-----------------------------|----------------------|-------------|--------|-----------|-----------|-----------------|
| <b>44 Washington Street</b> |                      |             |        |           |           |                 |
|                             | 44 Washington Street | RI-22-BOGUS | 1      | 1 BR      |           |                 |
|                             | 44 Washington Street | RI-22-BOGUS | 10     | 1 BR      |           |                 |
|                             | 44 Washington Street | RI-22-BOGUS | 11     | 1 BR      |           |                 |
|                             | 44 Washington Street | RI-22-BOGUS | 12     | 1 BR      |           |                 |
|                             | 44 Washington Street | RI-22-BOGUS | 13     | 1 BR      |           |                 |
|                             | 44 Washington Street | RI-22-BOGUS | 14     | 1 BR      |           |                 |
|                             | 44 Washington Street | RI-22-BOGUS | 15     | 1 BR      |           |                 |
|                             | 44 Washington Street | RI-22-BOGUS | 16     | 1 BR      |           |                 |
|                             | 44 Washington Street | RI-22-BOGUS | 17     | 1 BR      |           |                 |
|                             | 44 Washington Street | RI-22-BOGUS | 18     | 1 BR      |           |                 |
|                             | 44 Washington Street | RI-22-BOGUS | 19     | 1 BR      |           |                 |
|                             | 44 Washington Street | RI-22-BOGUS | 2      | 1 BR      |           |                 |

## Importing Tenant Events via XML

5

Click **Choose File** and select the XML file to upload. Click **Open**.



procorem

Search this WorkCenter

Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units

### Import Tenant Events

Clicking the Upload button below will upload the file(s) that you have selected to import. Please note that any data previously imported for the selected compliance period will be **permanently deleted**.

**While Tenant Events are being imported, editing of tenant events is prohibited.** You will see a processing screen until your import is complete.

You can import data for the selected compliance period as many times as necessary - the data will be **replaced** each time so as not to create duplicate information.

If the Status of the selected compliance period is **Finalized** you will not be able to Import Tenant events.

If you receive errors that a tenant event cannot be matched to a unit/building/property please create a Post on this WorkCenter to request that your unit/building/property data be updated.

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 notify the RIHousing of your needs.

Choose File

5

#### Import History

| Import Status      | File Name               | Vendor Name | Log Message   | Import Date                 |
|--------------------|-------------------------|-------------|---|-----------------------------|
| Failed with Errors | RI housing procorem.pdf |             | Error: Exception - Data at the root level is invalid. Line 1, position 1.<br>Information: Tenant event import was unsuccessful. | August 7th 2023, 1:05:32 pm |

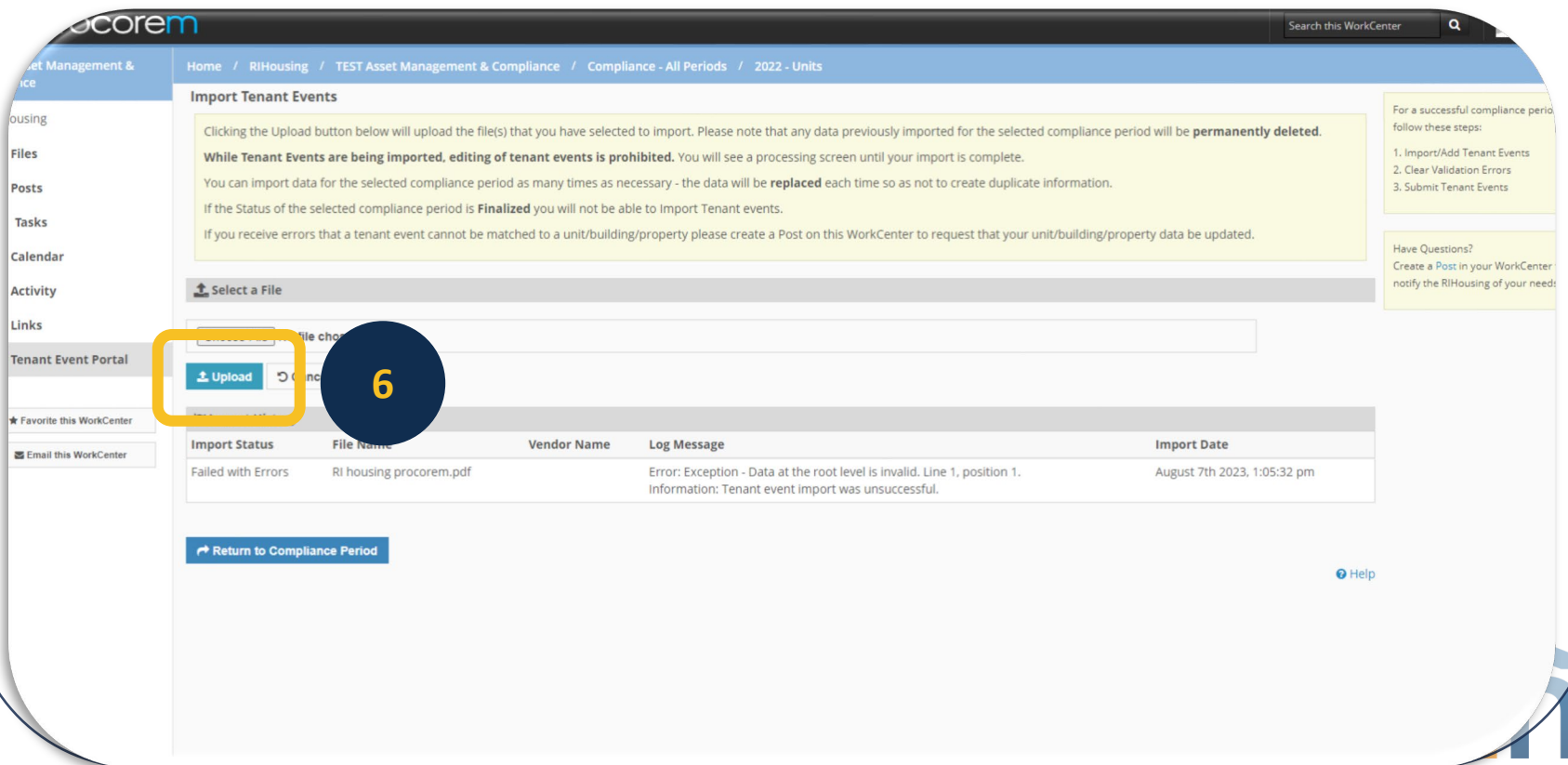
[Return to Compliance Period](#)

Help

## Importing Tenant Events via XML

6

Upload the XML file into Procorem.



The screenshot shows the Procorem web interface for importing tenant events. The breadcrumb trail is: Home / RI Housing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units. The page title is 'Import Tenant Events'. A yellow callout box contains the following text: 'Clicking the Upload button below will upload the file(s) that you have selected to import. Please note that any data previously imported for the selected compliance period will be **permanently deleted**. While Tenant Events are being imported, editing of tenant events is prohibited. You will see a processing screen until your import is complete. You can import data for the selected compliance period as many times as necessary - the data will be **replaced** each time so as not to create duplicate information. If the Status of the selected compliance period is **Finalized** you will not be able to Import Tenant events. If you receive errors that a tenant event cannot be matched to a unit/building/property please create a Post on this WorkCenter to request that your unit/building/property data be updated.'

Below the callout is a 'Select a File' section with a file selection input and an 'Upload' button. The 'Upload' button is highlighted with a yellow box and a blue circle containing the number '6'. To the right of the main content area, there are two yellow boxes: one with a 3-step process (1. Import/Add Tenant Events, 2. Clear Validation Errors, 3. Submit Tenant Events) and another with 'Have Questions? Create a Post in your WorkCenter notify the RI Housing of your needs.'

Below the 'Upload' button is a table with the following data:

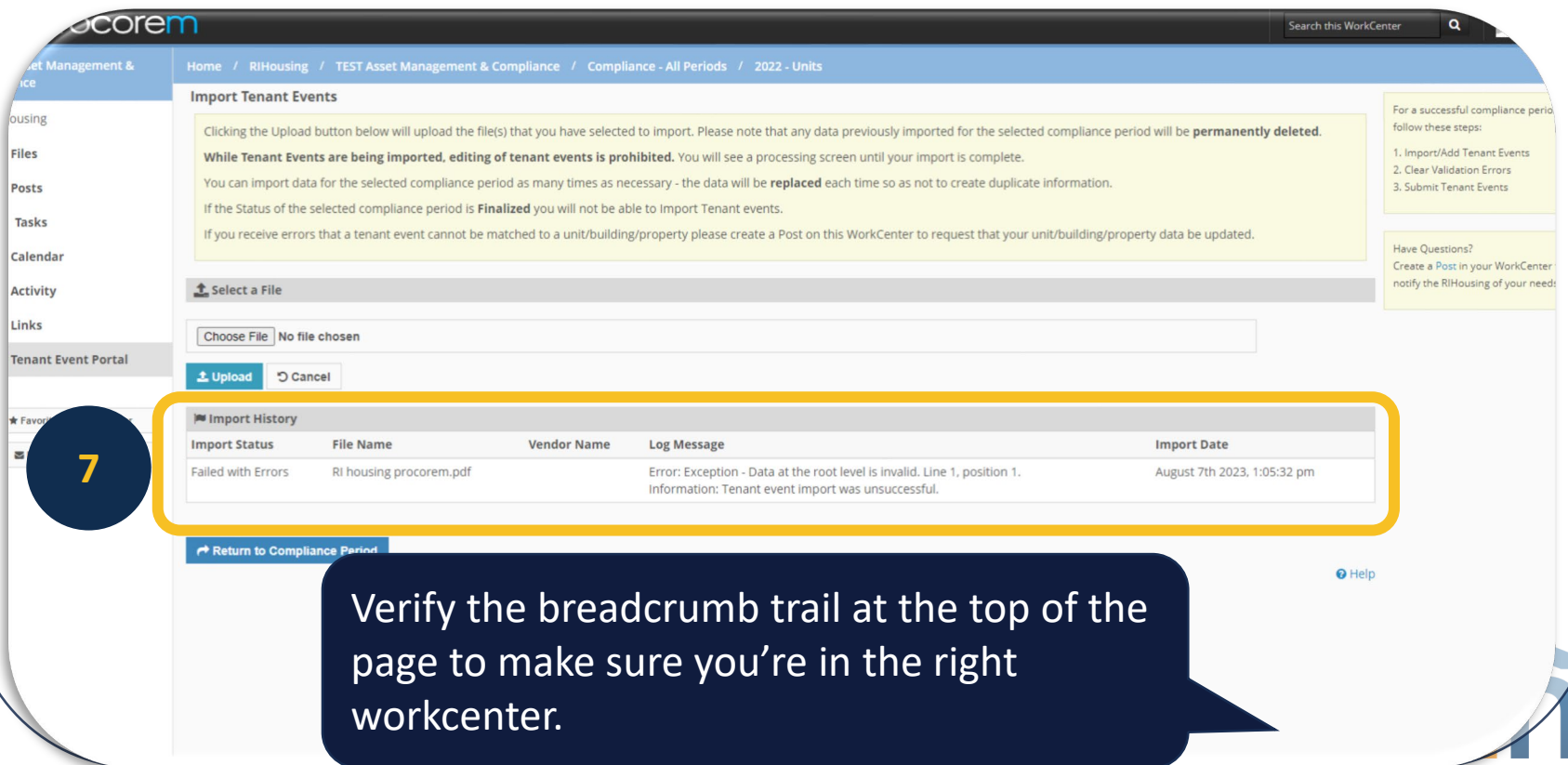
| Import Status      | File Name               | Vendor Name | Log Message  | Import Date                 |
|--------------------|-------------------------|-------------|--|-----------------------------|
| Failed with Errors | RI housing procorem.pdf |             | Error: Exception - Data at the root level is invalid. Line 1, position 1. Information: Tenant event import was unsuccessful. | August 7th 2023, 1:05:32 pm |

At the bottom left, there is a 'Return to Compliance Period' button. At the bottom right, there is a 'Help' icon.

## Importing Tenant Events via XML

7

If necessary, work through errors for a successful upload



Home / RI Housing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units

### Import Tenant Events

Clicking the Upload button below will upload the file(s) that you have selected to import. Please note that any data previously imported for the selected compliance period will be **permanently deleted**.  
**While Tenant Events are being imported, editing of tenant events is prohibited.** You will see a processing screen until your import is complete.  
You can import data for the selected compliance period as many times as necessary - the data will be **replaced** each time so as not to create duplicate information.  
If the Status of the selected compliance period is **Finalized** you will not be able to Import Tenant events.  
If you receive errors that a tenant event cannot be matched to a unit/building/property please create a Post on this WorkCenter to request that your unit/building/property data be updated.

Select a File

Choose File No file chosen

Upload Cancel

| Import Status      | File Name               | Vendor Name | Log Message   | Import Date                 |
|--------------------|-------------------------|-------------|---|-----------------------------|
| Failed with Errors | RI housing procorem.pdf |             | Error: Exception - Data at the root level is invalid. Line 1, position 1.<br>Information: Tenant event import was unsuccessful. | August 7th 2023, 1:05:32 pm |

Return to Compliance Period

Help

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 notify the RI Housing of your needs

Verify the breadcrumb trail at the top of the page to make sure you're in the right workcenter.

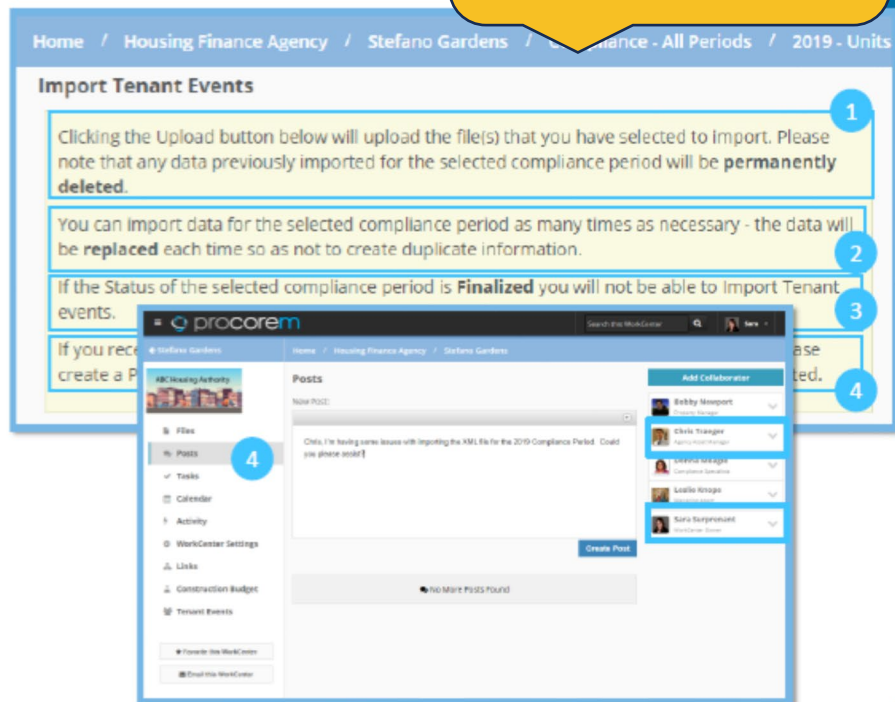


## Importing Tenant Events via XML

### Notes

#### Import Process Notes

- 1 Please note that every time you upload a new XML file, the previously uploaded events for the compliance period will be **deleted and replaced** with the data in the current XML file. If you have properties with multiple XML files, contact your agency to discuss combining your XML files.
- 2 New events will be created from data in the most recent successfully imported XML file.
- 3 If the **Compliance Period** is finalized, you cannot import new tenant events.
- 4 Notify the **WorkCenter Owner** or **Agency Asset Manager** for any XML Import errors that you cannot resolve without assistance.



The screenshot shows the 'Import Tenant Events' page in the Procorem system. The breadcrumb trail at the top reads: Home / Housing Finance Agency / Stefano Gardens / Compliance - All Periods / 2019 - Units. The page title is 'Import Tenant Events'. There are four numbered callouts: 1 points to the warning text: 'Clicking the Upload button below will upload the file(s) that you have selected to import. Please note that any data previously imported for the selected compliance period will be permanently deleted.'; 2 points to the text: 'You can import data for the selected compliance period as many times as necessary - the data will be replaced each time so as not to create duplicate information.'; 3 points to the text: 'If the Status of the selected compliance period is Finalized you will not be able to Import Tenant events.'; 4 points to the 'Create Post' button in the 'New POST' form area.

# Importing Tenant Events via XML

## System Errors

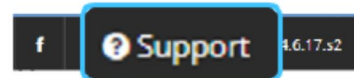
### Unsuccessful Import – System Errors

- 1 If you receive system errors on import, enter a support ticket. An object reference error is something **ProLink** can identify and correct.
- 2 If you attempt to import a file type other than **.xml** or **.txt**, you'll receive an error message – verify your file was generated properly from your **Property Management System**.
- 3 Any error that doesn't display easily recognizable data errors should be reported to **ProLink**.
- 4 System errors can be reported by clicking the **Support** link at the bottom of your browser while logged into **Procorem**.

| Import Status      | File Name | Vendor Name | Log Message  | Import Date                   |
|--------------------|-----------|-------------|--|-------------------------------|
| Failed with Errors |           |             | Error: Exception - Object reference not set to an instance of an object.<br>Information: Tenant event import was unsuccessful. | February 8th 2023, 9:40:43 am |

|                    |                 |  |  |                            |
|--------------------|-----------------|--|--|----------------------------|
| Failed with Errors | 1900Bosquet.zip |  | Error: Data at the root level is invalid. Line 1, position 1.<br>Error: Exception - Data at the root level is invalid. Line 1, position 1.<br>Information: Tenant event import was unsuccessful. | April 4th 2022, 6:26:00 pm |
|--------------------|-----------------|--|--|----------------------------|

| Log Message   | Import Date                   |
|---|-------------------------------|
| Information: Validation passed for schema version 5.0<br>Error: Transaction (Process ID 180) was deadlocked on lock resources with another process and has been chosen as the deadlock victim. Rerun the transaction.<br>Information: Tenant event import was unsuccessful.<br>Error: Exception - Transaction (Process ID 180) was deadlocked on lock resources with another process and has been chosen as the deadlock victim. Rerun the transaction.<br>Information: Tenant event import was unsuccessful. | January 25th 2023, 2:51:55 pm |



# Importing Tenant Events via XML

## Unsuccessful Import – Data Errors

- 1 If you receive errors on import, all tenant events have **not** been imported successfully.
- 2 Most error messages display the **Unit Number** with the specific error.
- 3 Errors will need to be corrected in your **Property Management System** before generating a new **XML** and importing the **XML** file again.

| Import Status | File Name              | Vendor Name   | Log Message  | Import Date                   |
|---------------|------------------------|---------------|--|-------------------------------|
| Completed     | StefanoGardens2020.xml | Yardi Systems | Information: Validation passed for schema version 6.0<br>Warning: Unit #G306. Cannot convert this event to a Transfer in event type: the transfer from: building cannot be found.<br>Warning: Cannot convert this event to a Transfer out event type: the transfer to: building cannot be found.<br>Information: Tenant event import was successful.<br>Information: 228 tenant events imported. | January 16th 2023, 3:12:42 pm |

|                    |                        |              |  |  |
|--------------------|------------------------|--------------|--|--|
| Failed with Errors | StefanoGardens2019.xml | Yardi System | Information: Validation failed for schema version 5.0 (Total errors = 505).<br>Error: Error - Validation Error: Unit #D102. Tenant Event cannot have program type of 'Market' and be in the LIHTC program.<br>Information: Tenant event import was unsuccessful.<br>Information: 0 tenant events imported. |  |
|--------------------|------------------------|--------------|--|--|

Select a File

Choose File | No file chosen

Upload | Cancel

| Import Status      | File Name              | Vendor Name | Log Message  | Import Date                    |
|--------------------|------------------------|-------------|--|--------------------------------|
| Failed with Errors | HighlandVillas2020.xml |             | Information: Validation passed for schema version 5.0<br>Error: Exception - Reporting Start Date in imported file does not fall within the Compliance Review Start and End dates for this Compliance Review.<br>Information: Tenant event import was unsuccessful. | November 16th 2022, 4:32:38 pm |

# Importing Tenant Events via XML

## Resolving XML Errors

- 1 The **address** does not match. Verify the address on the **Compliance Period** page – must match exactly
- 2 The **BIN** does not match. Verify the BIN on the **Compliance Period** page – must match exactly.

| Building  | Building Address | BIN       | Unit # | Unit Type | Household         | Last Event Date |
|-----------|------------------|-----------|--------|-----------|-------------------|-----------------|
| CO1900048 | 554 Rielo Ave    | CO1900048 | C101   | 2 BR      | Matthew Nelson    | 09/01/2018      |
|           | 554 Rielo Ave    | CO1900048 | C102   | 2 BR      | Laurent Niyitunga | 01/06/2020      |
|           | 554 Rielo Ave    | CO1900048 | C103   | 2 BR      | George Constanza  | 02/08/2019      |

- 3 The **Reporting Start and End** dates do not match. Verify the correct dates with your agency and update the data in your **Property Management System** .
- 4 The **Property Name** does not match. Verify the correct property name with your agency and update the data in your **Property Management System** .



If you receive a building address error or unmatched BIN error, note that events will not be imported for those addresses/BINs, even if a number of tenant events were imported for other addresses/BINs!

**Log Message**

Information: Validation failed for schema version 5.0 (Total errors = 503).  
 Information: Validation passed for schema version 4.0  
 Information: No building found with an address of 554 Rielo Avenue 1  
 Information: Tenant event import was successful.  
 Information: 219 tenant events imported.

Information: Validation failed for schema version 5.0 (Total errors = 503). 2  
 Information: Validation passed for schema version 4.0  
 Warning: LIHTC building (address of 554 Rielo Ave) has unmatched BIN CO-19-00048.  
 Information: Tenant event import was successful.  
 Information: 219 tenant events imported.

Information: Validation failed for schema version 5.0 (Total errors = 503). 3  
 Information: Validation passed for schema version 4.0  
 Error: Exception - Reporting Start Date in imported file does not fall within the Compliance Review Start and End dates for this Compliance Review.  
 Information: Tenant event import was unsuccessful.

Information: Validation failed for schema version 5.0 (Total errors = 503). 4  
 Information: Validation passed for schema version 4.0  
 Error: Exception - Property name in imported file does not match the property for this Compliance Review.  
 Information: Tenant event import was unsuccessful.

## Importing Tenant Events via XML

### Resolving XML Errors – NAHMA Standards

- 1 **Negative amounts are not allowed.** Update the value in your **Property Management System** and regenerate XML to import again.
- 2 **Ethnicity type values do not meet NAHMA standard values.** Update the value in your **Property Management System** and regenerate XML to import again.
- 3 **Gender value does not match NAHMA standard values.** Update the value in your **Property Management System** and regenerate XML to import again.
- 4 **Race type values do not meet NAHMA standard values.** Update the value in your **Property Management System** and regenerate XML to import again.
- 5 **Income type values do not meet NAHMA standard values.** Update the value in your **Property Management System** and regenerate XML to import again.

Error: 1  
**Validation errors for schema version 4.0:**  
 Unit C201; Validation Message: The 'Amount' element is invalid - The value '-20800.00' is invalid according to its datatype 'STDMoney' - The MinInclusive constraint failed.  
 (Line Number: 363, Line Position 31). (1 total).

Information: Validation passed for schema version 6.0 2  
 Error: Error - Validation Error: Unit #C102. Ethnicity type combination is invalid.  
 Information: Tenant event import was unsuccessful.  
 Information: 0 tenant events imported.

**Validation errors for schema version 4.0:** 3  
 Unit C102; Validation Message: The 'Gender' element is invalid - The value "" is invalid according to its datatype 'Gender' - The Enumeration constraint failed.  
 (Line Number: 40, Line Position 11). (1 total).

Information: Validation failed for schema version 5.0 (Total errors = 503).  
 Information: Validation passed for schema version 4.0  
 Error: Error - Validation Error: Unit #C102. Race type combination is invalid. 4  
 Information: Tenant event import was unsuccessful.  
 Information: 0 tenant events imported.

Error: 5  
**Validation errors for schema version 4.0:**  
 Validation Message: The 'IncomeType' attribute is invalid - The value 'A' is invalid according to its datatype 'IncomeType' - The Enumeration constraint failed.  
 (Line Number: 363, Line Position 19). (1 total).

## NAHMA Definitions

### Importing Tenant Events via XML

What's this NAHMA standard of which you speak?

GOOGLE: Data Transfer Standard Dictionary NAHMA

**Type Name:** EthnicityType  
**Description:** A list of the valid Ethnicity type choices.  
**Rules:**  
 a) If any of PR, C, MAC or O is reported, then H must also be reported.  
 b) H, N, TDR and MISSING are mutually exclusive.  
 c) Any one or more of PR, C, MAC and O may be reported.  
**Data Type:** Enumeration of String

"H" - Hispanic or Latino  
 "N" - Not Hispanic or Latino  
 "PR" - Puerto Rican  
 "C" - Cuban  
 "MAC" - Mexican  
 "O" - Another Hispanic or Latino  
 "TDR" - Tenant Declined to Respond  
 "MISSING" - Missing

**Type Name:** IncomeType  
**Description:** A list of the valid income type choices. This includes what is the type of the income being reported.  
**Data Type:** Enumeration of String

"B" - Business (including distributed profits and net income from business)  
 "CS" - Child Support  
 "F" - Federal Wage  
 "G" - General Assistance  
 "I" - Indian Trust  
 "M" - Military Pay  
 "N" - Other Non Wage Source (including alimony, unemployment benefits)  
 "PE" - Pensions (including veterans pensions, military retirement, and income from other pensions and annuities)

**Type Name:** AlienRegNB  
**Description:** Used to hold the last four(4) digits of the social security number for a household member. Cannot be blank. If the SSN is unknown, send 0000 do not send 9999. NOTE, no dashes are accepted, numbers only.  
**Data Type:** A string used to hold the last four(4) digits of the social security number for a household member.

**Type Name:** R  
**Description:** A  
**Data Type:** E

**Type Name:** Gender  
**Description:** A list of the valid gender choices.  
**Data Type:** Enumeration of String  
 "NA" - Not Applicable  
 "M" - Male  
 "F" - Female

"A" - Asian  
 "ACH" - Chinese  
 "AF" - Filipino  
 "AJ" - Japanese  
 "AK" - Korean  
 "AV" - Vietnamese  
 "AO" - Asian Other  
 "AI" - American Indian/Alaskan Native  
 "B" - Black/African American  
 "NH" - Native Hawaiian/Other Pacific Islander  
 "PNH" - Native Hawaiian  
 "PGC" - Guamanian or Chamorro  
 "PS" - Samoan  
 "PO" - Pacific Islander Other  
 "O" - Other  
 "W" - White  
 "TDR" - Tenant Declined to Respond  
 "MISSING" - Missing

**Type Name:** SSN  
**Description:** Used to hold the last four(4) digits of the social security number for a household member. Cannot be blank. If the SSN is unknown, send 0000 do not send 9999. NOTE, no dashes are accepted, numbers only.  
**Data Type:** String(4) of all decimals between 0 and 9

## Resolving XML Errors

### Importing Tenant Events via XML

#### Resolving XML Errors – Data Errors

- 1 If the unit is selected as **MKT** in your **Property Management System**, it cannot have **Tax Credit** or **HOME** selected as a program. Update the event in your system, regenerate the **XML**, and import again.
- 2 If a unit is selected as a **HOME** unit, a value of **1** must be selected for **LOW** or a value of **3** for **HIGH**. Update the event in your system, regenerate the **XML**, and import again.
- 3 A **Transfer Out** event must have an accompanying **Transfer In** event to be successfully imported. Update the events in your system, regenerate the **XML**, and import again.

Information: Validation failed for schema version 5.0 (Total errors = 503). December 21st 2022, 2:31:28 pm  
Information: Validation passed for schema version 4.0  
Error: Error - Validation Error: Unit #D102. Tenant Event cannot have program type of 'Market' and be in the LIHTC program. 1  
Information: Tenant event import was unsuccessful.  
Information: 0 tenant events imported.

Information: Validation passed for schema version 6.0 September 29th 2022, 3:32:20 pm  
Error: Error - Validation Error: Unit #507. HOME Unit Type is required on a Tenant Event when HOME is a selected Program. Error - Validation Error: Unit #507 . HOME Unit Type is required when HOME is selected on the tenant event. 2  
Information: Tenant event import was unsuccessful.  
Information: 0 tenant events imported.

Information: Validation passed for schema version 6.0  
Error: Building: CO1900055 Unit: G306 Event Date: 06/04/2020 Event Type: TransferOut. Importer unable to find associated Transfer In event.  
Error: An error occurred while importing. 3  
Information: Tenant event import was unsuccessful.  
Information: 0 tenant events imported.

Success!!

## Importing Tenant Events via XML

### Successful Import

- 1 When your file begins the upload, you'll see the blue **Processing** ribbon at the top of the screen.
- 2 Next, you'll see a green **Tenant event import has been scheduled** ribbon indicating the import has been scheduled and XML file will be processed.
- 3 The **Import** could take several minutes. The first **Import Status** you see will be **Pending**.
- 4 The second status will be **Processing** and will display the **Vendor** name.
- ! You can manually refresh by clicking the refresh button on your browser every few minutes. The page will automatically refresh every 10 minutes.
- 5 **Tenant Events** have been successfully imported when **Import Status** is **Completed** and the **Log Message** indicates tenant event import was successful and a specific amount of tenant events have been imported.
- 6 At this point, you can click on the **{Year}-Units** breadcrumb to return to the Compliance Period page or scroll down on the import page to click **Return to Compliance Period**.



The screenshot shows the Procorem interface with several steps highlighted by numbered callouts:

- 1**: A blue ribbon at the top of the page says "Processing..."
- 2**: A green ribbon below it says "Tenant event import has been scheduled".
- 3**: An "Import History" table shows a row with "Import Status" as "Pending".
- 4**: A second "Import History" table shows a row with "Import Status" as "Processing" and a "Vendor Name" listed.
- 5**: A third "Import History" table shows a row with "Import Status" as "Completed" and a detailed "Log Message" indicating a successful import.
- 6**: A modal dialog box is open, showing a "Return to Compliance Period" button.



# Importing Tenant Events via XML

## Successful Import

Home / Housing Finance Agency / Giverny Gardens / Compliance - All Periods / 2021 - Units

### Import Tenant Events

Clicking the Upload button below will upload the file(s) that you have selected to import. Please note that any data previously imported will be **deleted**.

**While Tenant Events are being imported, editing of tenant events is prohibited.** You will see a processing screen until your import is complete.

You can import data for the selected compliance period as many times as necessary - the data will be **replaced** each time so as long as the status is not finalized.

If the Status of the selected compliance period is **Finalized** you will not be able to import Tenant events.

If you receive errors that a tenant event cannot be matched to a unit/building/property please create a Post on this WorkCenter.

Select a File

Choose File No file chosen

Upload Cancel

Import History

Completed

File Name  
Giverny2

Information: Validation passed for schema version 6.0  
Information: Tenant event import was successful.  
Information: 72 tenant events imported.

Import Date

February 2nd 2023, 12:57:09 pm



# Importing Tenant Events via XML

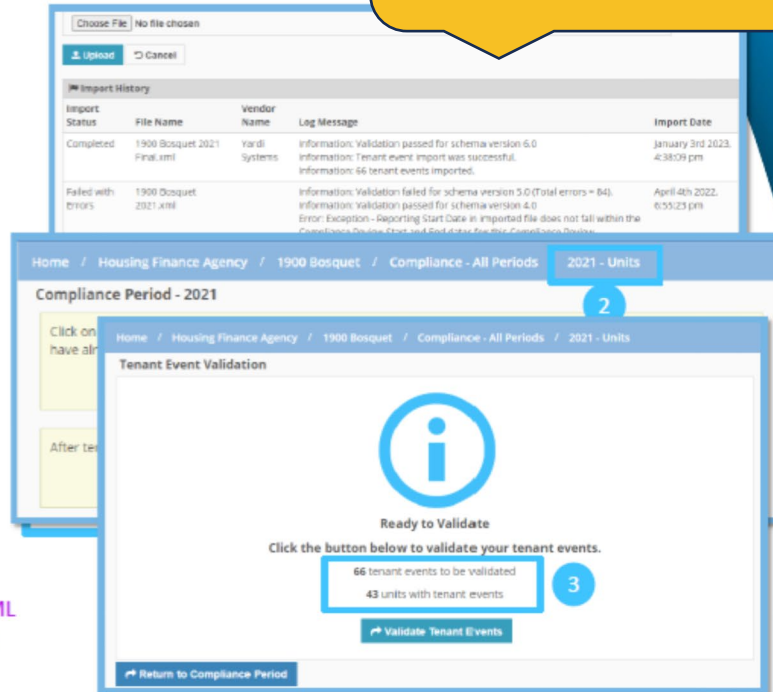
**Validation**

## Validation after Successful Import

- 1 Once the import is successful, scroll down on the **Import Tenant Events** page to click **Return to Compliance Period**.
- 2 OR click **XXX – Units** in the **breadcrumb** to navigate back to the **Compliance Period** page and click the **Tenant Event Validation** button.
- 3 Once you've landed on the **Tenant Event Validation** page, the screen will let you know how many events need to be validated and how many units have tenant events.



If the number of events or units appears incorrect, verify your XML import completed message again, or contact the agency to verify information.



The screenshot shows the Procorem interface. At the top, there's a 'Choose File' button and 'Upload'/'Cancel' buttons. Below is an 'Import History' table:

| Import Status      | File Name                   | Vendor Name   | Log Message  | Import Date                  |
|--------------------|-----------------------------|---------------|--|------------------------------|
| Completed          | 1900 Bosquet 2021 Final.xml | Yardi Systems | Information: Validation passed for schema version 6.0<br>Information: Tenant event import was successful.<br>Information: 66 tenant events imported.   | January 3rd 2022, 4:38:59 pm |
| Failed with errors | 1900 Bosquet 2021.xml       |               | Information: Validation failed for schema version 5.0 (Total errors = 04).<br>Information: Validation passed for schema version 4.0<br>Error: Exception - Reporting Start Date in imported file does not fall within the Compliance Period Start and End dates for this Compliance Period. | April 4th 2022, 6:55:23 pm   |

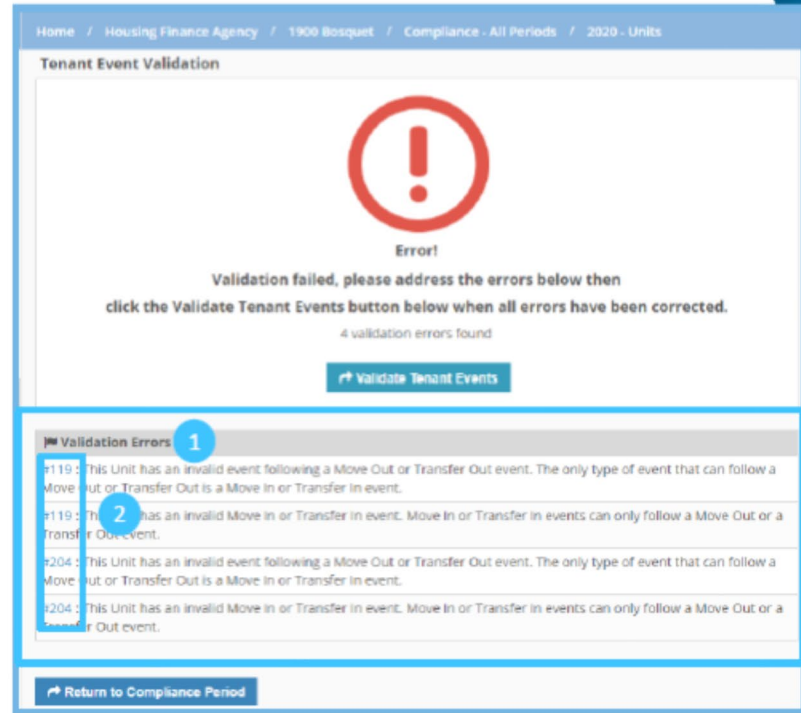
Below the table, the breadcrumb navigation shows: Home / Housing Finance Agency / 1900 Bosquet / Compliance - All Periods / 2021 - Units. A blue box highlights '2021 - Units' with a '2' callout. Below that, the 'Compliance Period - 2021' page is shown, with a 'Tenant Event Validation' section. It features an information icon and the text: 'Ready to Validate', 'Click the button below to validate your tenant events.', '66 tenant events to be validated', and '43 units with tenant events'. A blue box highlights these numbers with a '3' callout. A 'Validate Tenant Events' button is visible below the numbers. At the bottom, there is a 'Return to Compliance Period' button.

## Importing Tenant Events via XML

### Correct Validation Errors

- 1 Any tenant events missing data or occurring out of chronological order will display in the **Validation Errors** section.
- 2 Clicking the **Unit Number** hyperlink will take you directly to the tenant event to make updates.

Properties uploading XML files must never make manual corrections in Procorem. Instead, update your property management software and generate a new file for upload.



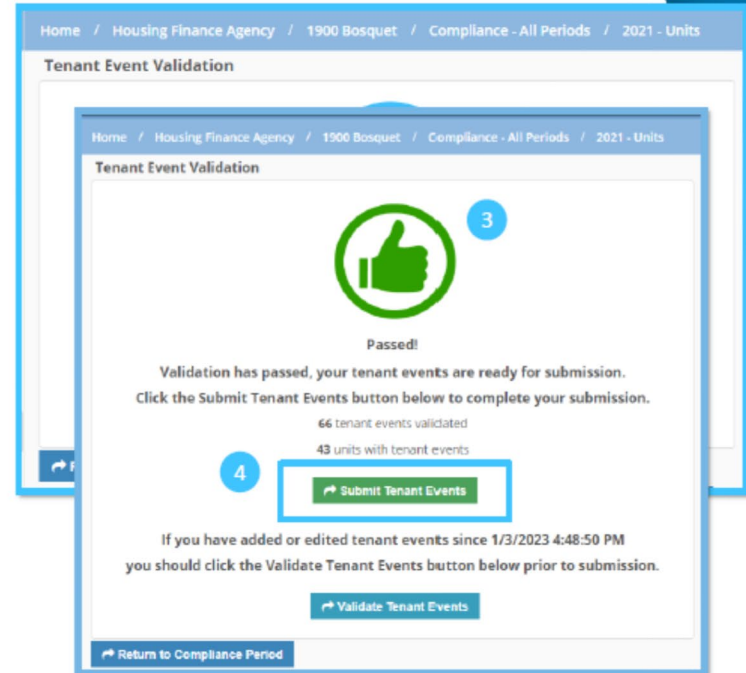
The screenshot shows the 'Tenant Event Validation' page in Procorem. At the top, there is a breadcrumb trail: Home / Housing Finance Agency / 1900 Bosquet / Compliance - All Periods / 2020 - Units. The main heading is 'Tenant Event Validation'. Below this is a large red exclamation mark icon with the word 'Error!' underneath. A message states: 'Validation failed, please address the errors below then click the Validate Tenant Events button below when all errors have been corrected.' Below the message, it says '4 validation errors found' and there is a blue button labeled 'Validate Tenant Events'. Below the main message area is a section titled 'Validation Errors' with a sub-heading '1'. This section contains a list of four error messages, each starting with a unit number and a description of the validation failure. The second error message is highlighted with a blue box and a '2' in a circle. At the bottom of the validation errors section, there is a blue button labeled 'Return to Compliance Period'.

## Importing Tenant Events via XML

### Validate Tenant Events

- 1 Note the number of events and number of units  
If the number of events/units seems incorrect, verify once again your import was successful.
- 2 Click the **Validate Tenant Events** button  
The screen will automatically update every 5 seconds until validation is complete.
- 3 If validation is successful and completes with no errors, you'll see a **Passed** message on the screen.
- 4 Click the **Submit Tenant Events** button.

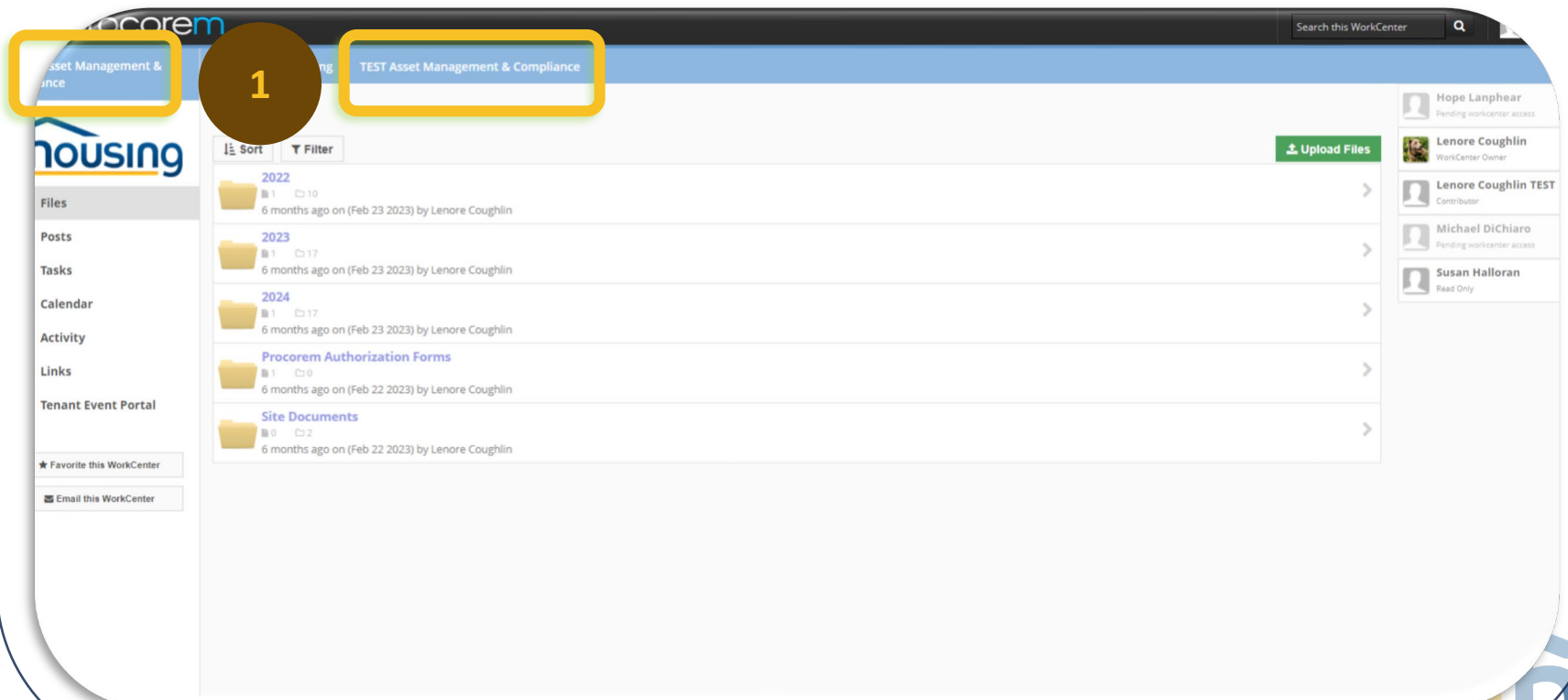
RIHousing asks that you refrain from using the **Submit Tenant Events** button until the end of the Compliance Period.



# Importing Tenant Events through Manual Entry

1

Navigate to the workcenter where you would like to import tenant events

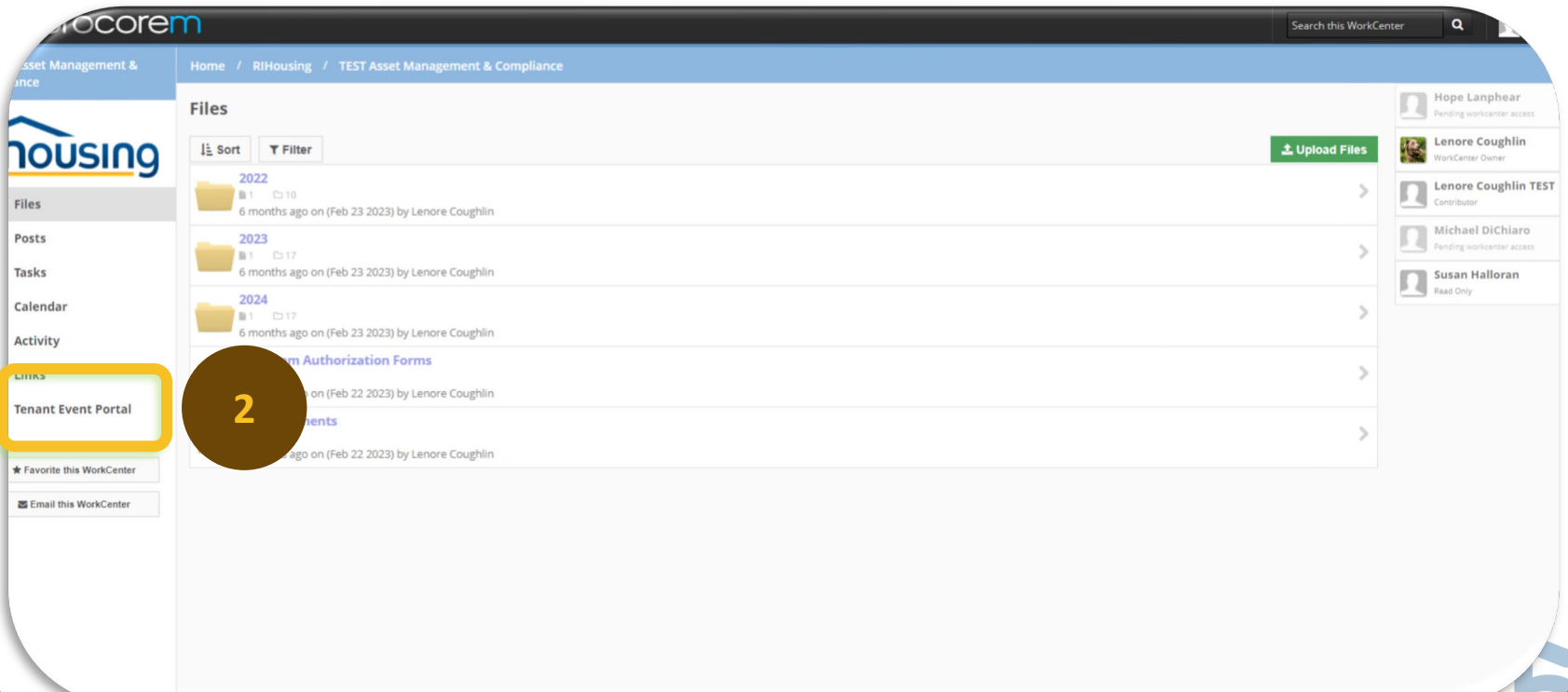


1

# Importing Tenant Events through Manual Entry

2

Select the Tenant Portal menu item in the left navigation panel



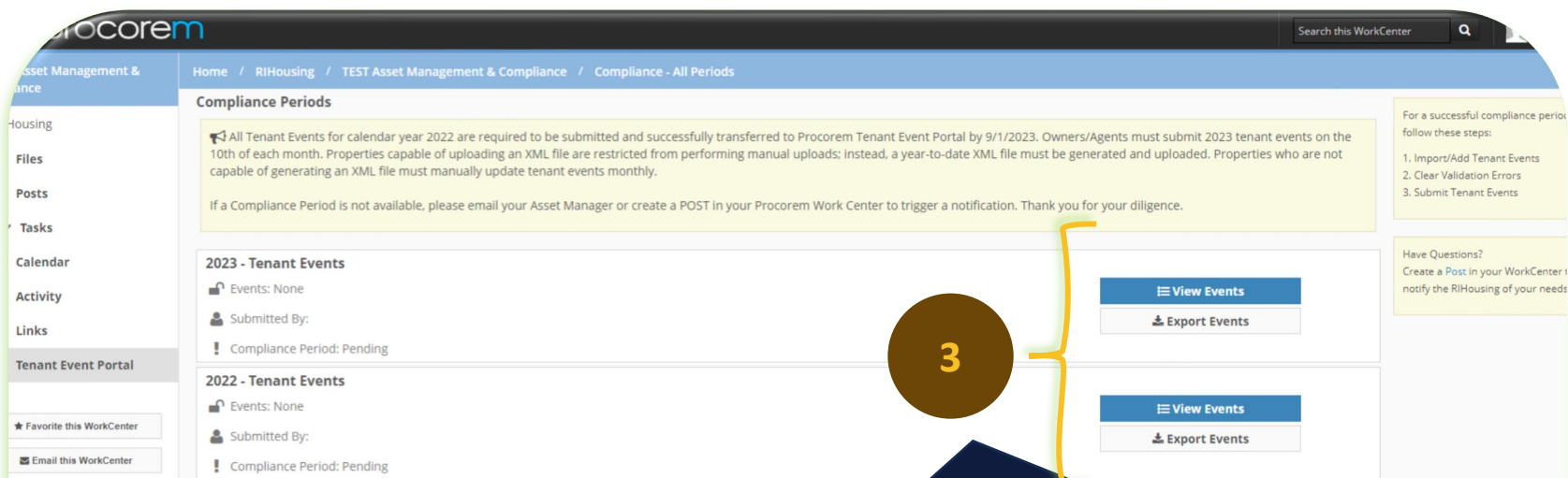
The screenshot displays the Procurement system interface. The left navigation panel is visible, with the 'Tenant Event Portal' menu item highlighted by a yellow box. A large brown circle with the number '2' is overlaid on the navigation panel. The main content area shows a 'Files' section with a list of folders for the years 2022, 2023, and 2024, each containing a file named 'Tenant Authorization Forms'. The right sidebar shows a list of users, including Hope Lanphear, Lenore Coughlin, Michael DiChiaro, and Susan Halloran.

2

## Importing Tenant Events through Manual Entry

3

The Compliance Periods screen will display available compliance periods. Select **View Events** for the compliance year you're updating.



The screenshot shows the Procorem interface for the 'Compliance Periods' screen. The breadcrumb trail is 'Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods'. The main content area is titled 'Compliance Periods' and contains a yellow informational banner with the following text: 'All Tenant Events for calendar year 2022 are required to be submitted and successfully transferred to Procorem Tenant Event Portal by 9/1/2023. Owners/Agents must submit 2023 tenant events on the 10th of each month. Properties capable of uploading an XML file are restricted from performing manual uploads; instead, a year-to-date XML file must be generated and uploaded. Properties who are not capable of generating an XML file must manually update tenant events monthly. 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 diligence.' Below this banner, there are two sections for '2023 - Tenant Events' and '2022 - Tenant Events'. Each section shows 'Events: None', 'Submitted By:', and 'Compliance Period: Pending'. To the right of each section are two buttons: 'View Events' and 'Export Events'. A yellow callout box with the number '3' points to the 'View Events' buttons. On the right side of the screen, there are two additional yellow boxes: one with instructions for a successful compliance period ('For a successful compliance period follow these steps: 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 RIHousing of your needs').

If the **Compliance Periods** page is blank, contact your Asset Manager.

If **Events: Submitted**, you will also be unable to import tenant events.

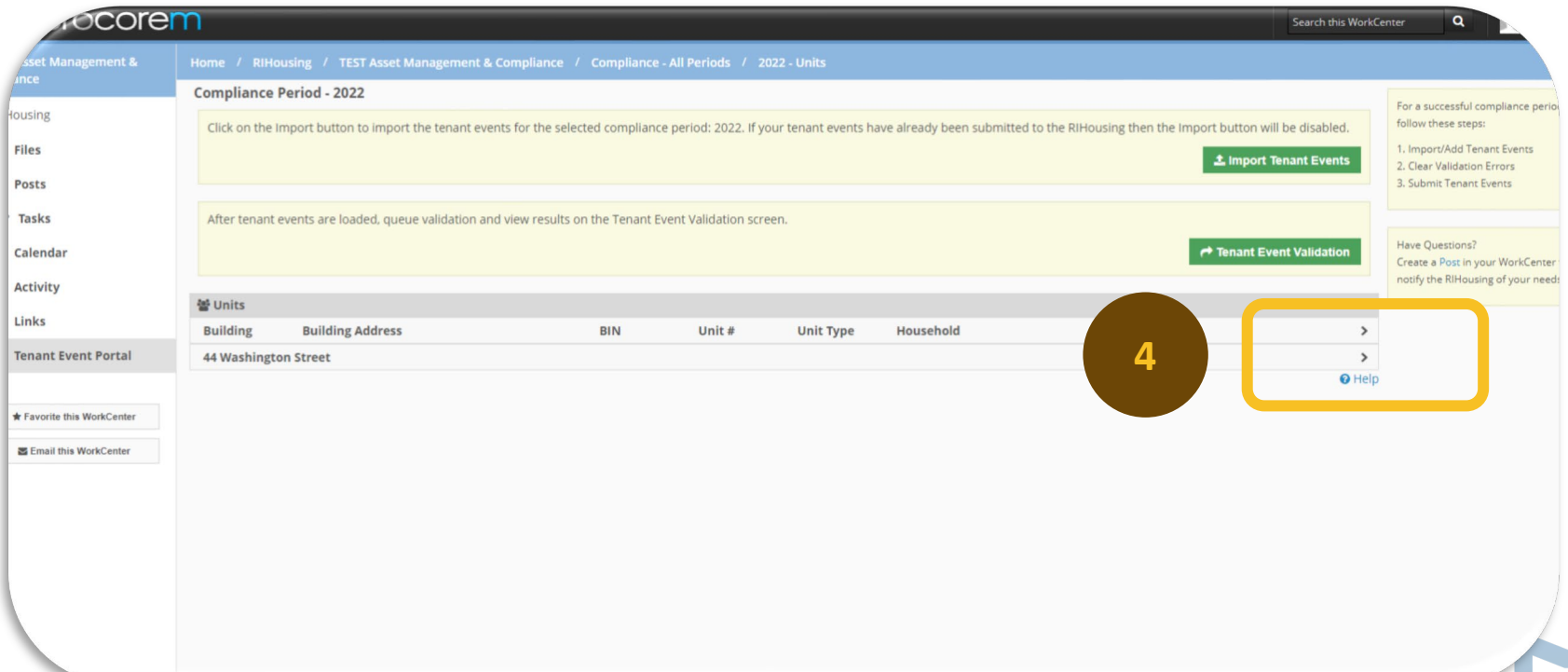
### 2022 - Tenant Events

- 🔒 Events: **Submitted**
- 👤 Submitted By: Coughlin, Lenore
- ⚠️ Compliance Period: Un-finalized

# Importing Tenant Events through Manual Entry

4

Expand each **Building** using the toggle switch to reveal the units



Compliance Period - 2022

Click on the Import button to import the tenant events for the selected compliance period: 2022. If your tenant events have already been submitted to the RIHousing then the Import button will be disabled.

After tenant events are loaded, queue validation and view results on the Tenant Event Validation screen.

| Building             | Building Address | BIN | Unit # | Unit Type | Household |
|----------------------|------------------|-----|--------|-----------|-----------|
| 44 Washington Street |                  |     |        |           |           |

For a successful compliance period follow these steps:

1. Import/Add Tenant Events
2. Clear Validation Errors
3. Submit Tenant Events

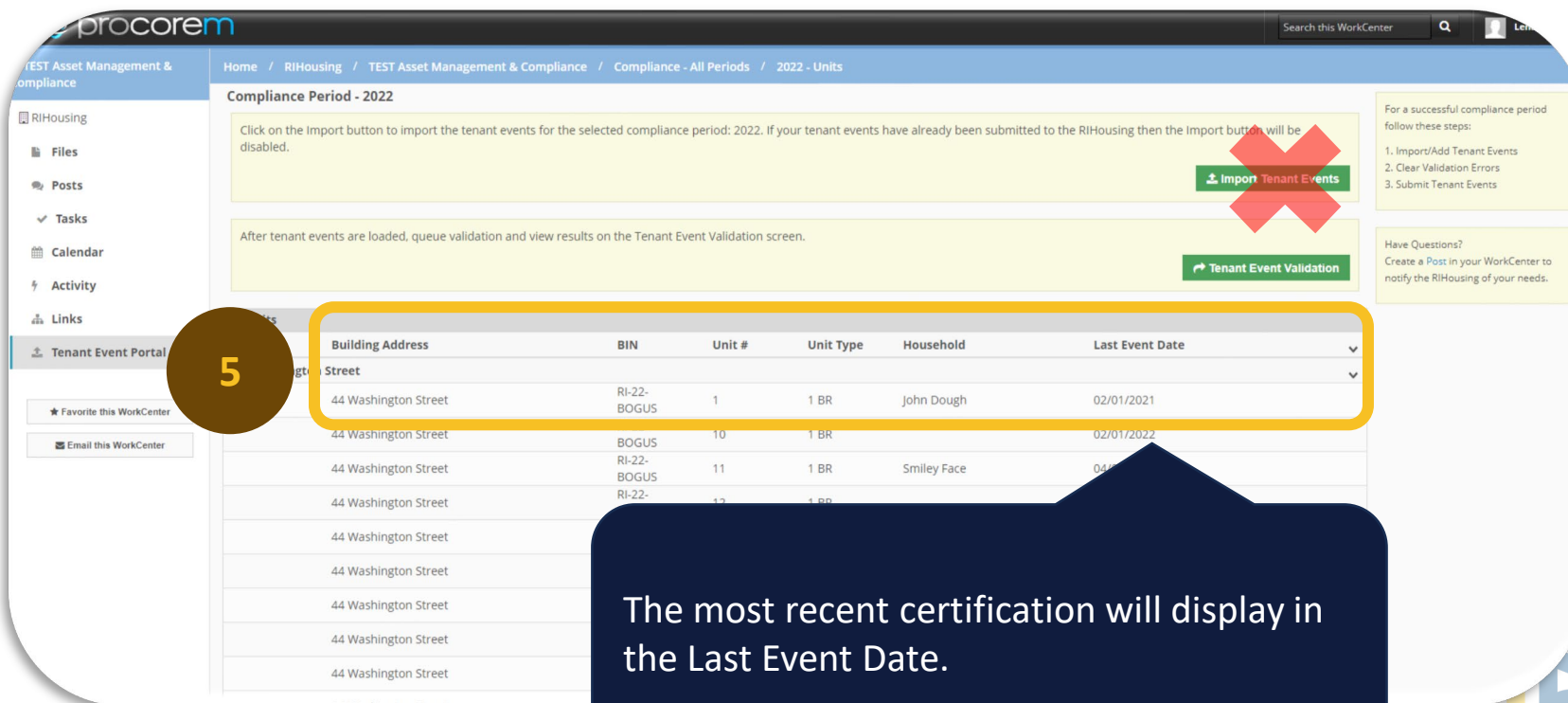
Have Questions?  
Create a Post in your WorkCenter to notify the RIHousing of your needs.



# Importing Tenant Events through Manual Entry

5

Select a unit by clicking on the unit's row.



The screenshot shows the Procorem interface for 'Compliance Period - 2022'. A yellow box highlights the 'Import Tenant Events' button, which has a red 'X' over it, indicating it is disabled. A blue callout box points to the 'Last Event Date' column in the table below, stating: 'The most recent certification will display in the Last Event Date.'

| Building Address     | BIN         | Unit # | Unit Type | Household   | Last Event Date |
|----------------------|-------------|--------|-----------|-------------|-----------------|
| 44 Washington Street | RI-22-BOGUS | 1      | 1 BR      | John Dough  | 02/01/2021      |
| 44 Washington Street | BOGUS       | 10     | 1 BR      |             | 02/01/2022      |
| 44 Washington Street | RI-22-BOGUS | 11     | 1 BR      | Smiley Face | 04/01/2022      |
| 44 Washington Street | RI-22-      | 12     | 1 BR      |             |                 |
| 44 Washington Street |             |        |           |             |                 |
| 44 Washington Street |             |        |           |             |                 |
| 44 Washington Street |             |        |           |             |                 |
| 44 Washington Street |             |        |           |             |                 |
| 44 Washington Street |             |        |           |             |                 |
| 44 Washington Street |             |        |           |             |                 |
| 44 Washington Street |             |        |           |             |                 |

5

The most recent certification will display in the Last Event Date.



## Importing Tenant Events through Manual Entry

6

Verify the unit to be updated. Click **+ Add Tenant Event**.

6

+ Add Tenant Event

44 Washington Street - John Dough #1

### Tenant Events

| Event Type | Event Date | Household  | Program(s) |
|------------|------------|------------|------------|
| Move In    | 02/01/2021 | John Dough | LIHTC      |

For a successful compliance period follow these steps:

1. Import/Add Tenant Events
2. Clear Validation Errors
3. Submit Tenant Events

Help

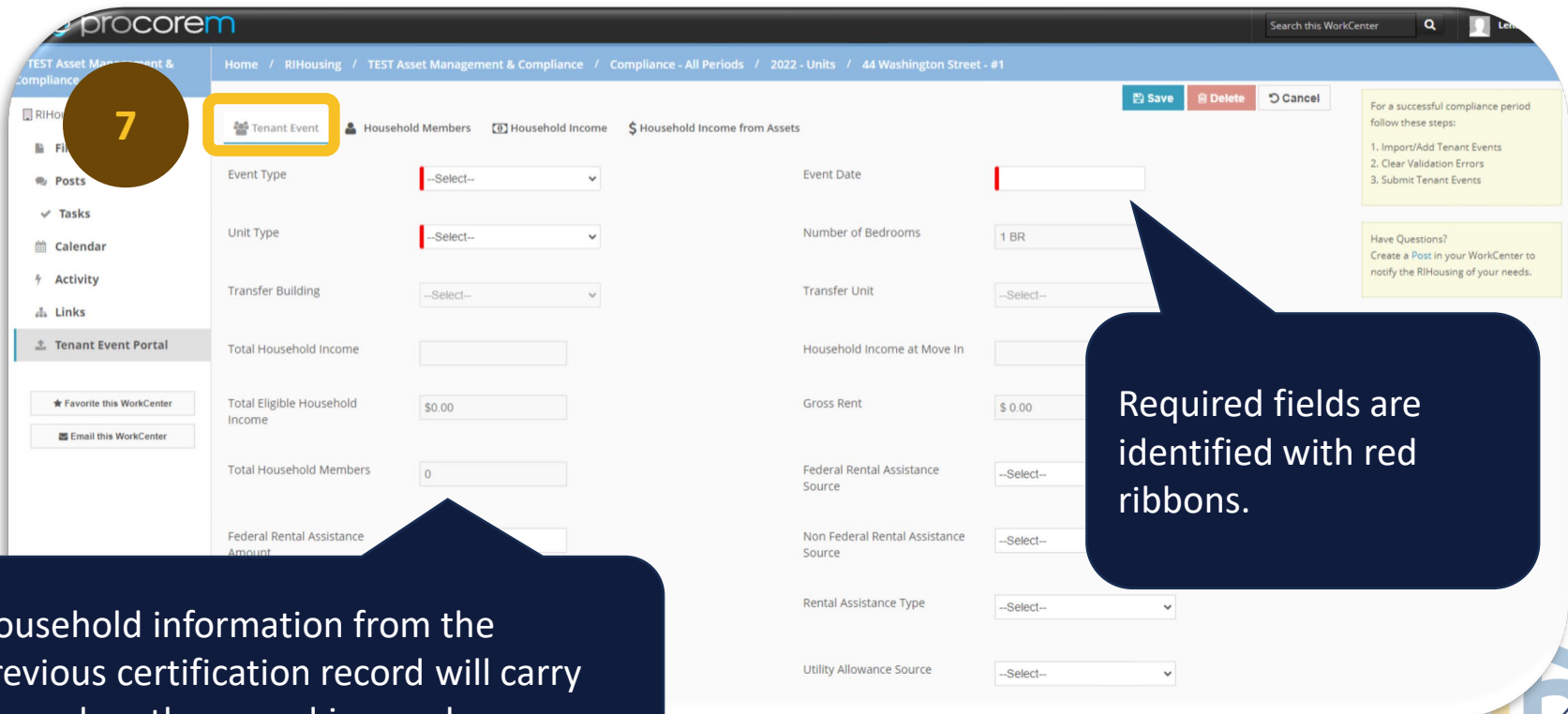
Have Questions?  
Create a Post in your WorkCenter  
notify the RIHousing of your need.

Tenant Events should only be amended in the current compliance year. For instance, a 2021 tenant event cannot be corrected in 2022.

## Importing Tenant Events through Manual Entry

7

Starting with the Tenant Event tab, populate each fillable field as applicable.



The screenshot displays the Procorem Tenant Event Portal interface. The breadcrumb trail is: Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units / 44 Washington Street - #1. The 'Tenant Event' tab is selected and highlighted with a yellow box. The form contains the following fields:

| Field Name                           | Value / Status          |
|--------------------------------------|-------------------------|
| Event Type                           | --Select-- (Red ribbon) |
| Unit Type                            | --Select-- (Red ribbon) |
| Transfer Building                    | --Select--              |
| Total Household Income               | [Empty]                 |
| Total Eligible Household Income      | \$0.00                  |
| Total Household Members              | 0                       |
| Federal Rental Assistance Amount     | [Empty]                 |
| Event Date                           | [Empty]                 |
| Number of Bedrooms                   | 1 BR                    |
| Transfer Unit                        | --Select--              |
| Household income at Move In          | [Empty]                 |
| Gross Rent                           | \$ 0.00                 |
| Federal Rental Assistance Source     | --Select--              |
| Non Federal Rental Assistance Source | --Select--              |
| Rental Assistance Type               | --Select--              |
| Utility Allowance Source             | --Select--              |

Buttons: Save, Delete, Cancel

Instructions: 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.

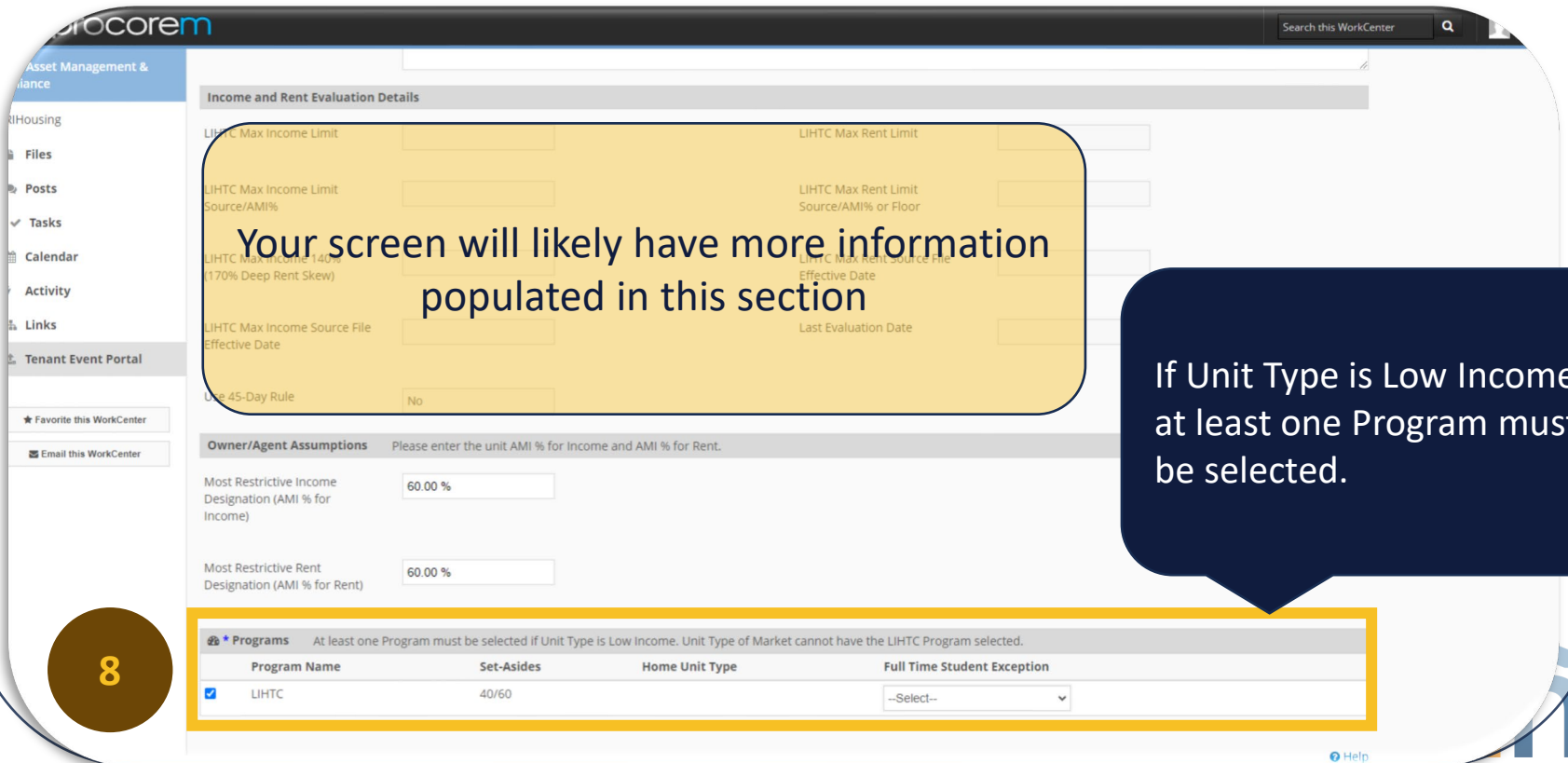
Required fields are identified with red ribbons.

Household information from the previous certification record will carry over when the record is saved.

## Importing Tenant Events through Manual Entry

8

Verify the **Programs** associated with the unit. Select **Full Time Student Status Exception** if applicable.



**Income and Rent Evaluation Details**

LIHTC Max Income Limit  LIHTC Max Rent Limit

LIHTC Max Income Limit Source/AMI%  LIHTC Max Rent Limit Source/AMI% or Floor

LIHTC Max Income 140% (170% Deep Rent Skew)  LIHTC Max Rent Source File Effective Date

LIHTC Max Income Source File Effective Date  Last Evaluation Date

Use 45-Day Rule  No

**Owner/Agent Assumptions** Please enter the unit AMI % for Income and AMI % for Rent.

Most Restrictive Income Designation (AMI % for Income)

Most Restrictive Rent Designation (AMI % for Rent)

**Programs** At least one Program must be selected if Unit Type is Low Income. Unit Type of Market cannot have the LIHTC Program selected.

| Program Name                              | Set-Asides | Home Unit Type | Full Time Student Exception |
|---|------------|----------------|-----------------------------|
| <input checked="" type="checkbox"/> LIHTC | 40/60      |                | --Select--                  |

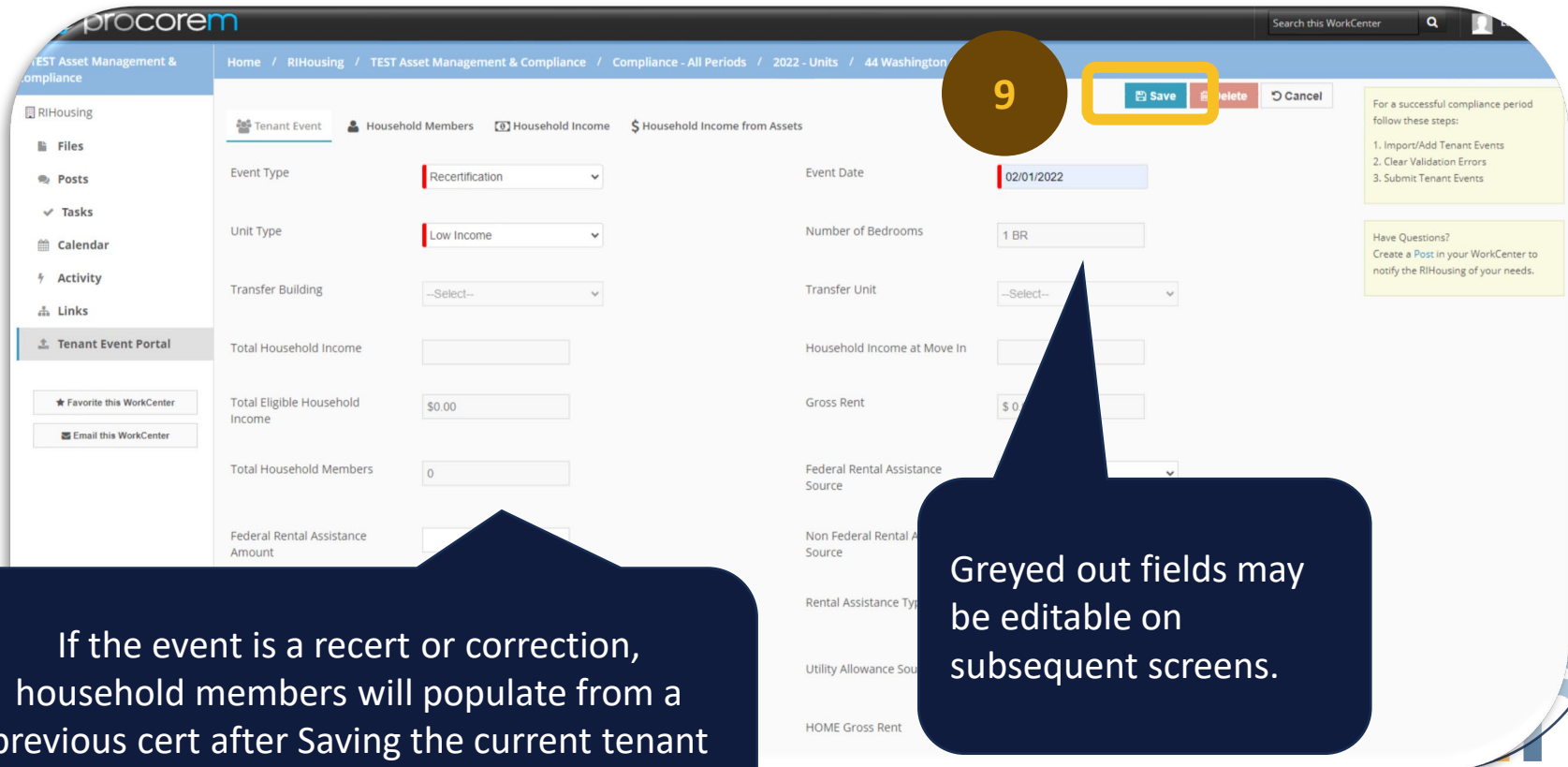
8

If Unit Type is Low Income, at least one Program must be selected.

## Importing Tenant Events through Manual Entry

9

After confirming the details of the tenant event, click **Save**.



procorem

Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units / 44 Washington

RIHousing

Tenant Event Household Members Household Income Household Income from Assets

Event Type Recertification Event Date 02/01/2022

Unit Type Low Income Number of Bedrooms 1 BR

Transfer Building --Select-- Transfer Unit --Select--

Total Household Income

Total Eligible Household Income \$0.00

Total Household Members 0

Federal Rental Assistance Amount

Household Income at Move In

Gross Rent \$0

Federal Rental Assistance Source

Non Federal Rental Assistance Source

Rental Assistance Type

Utility Allowance Source

HOME Gross Rent

Save Delete Cancel

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.

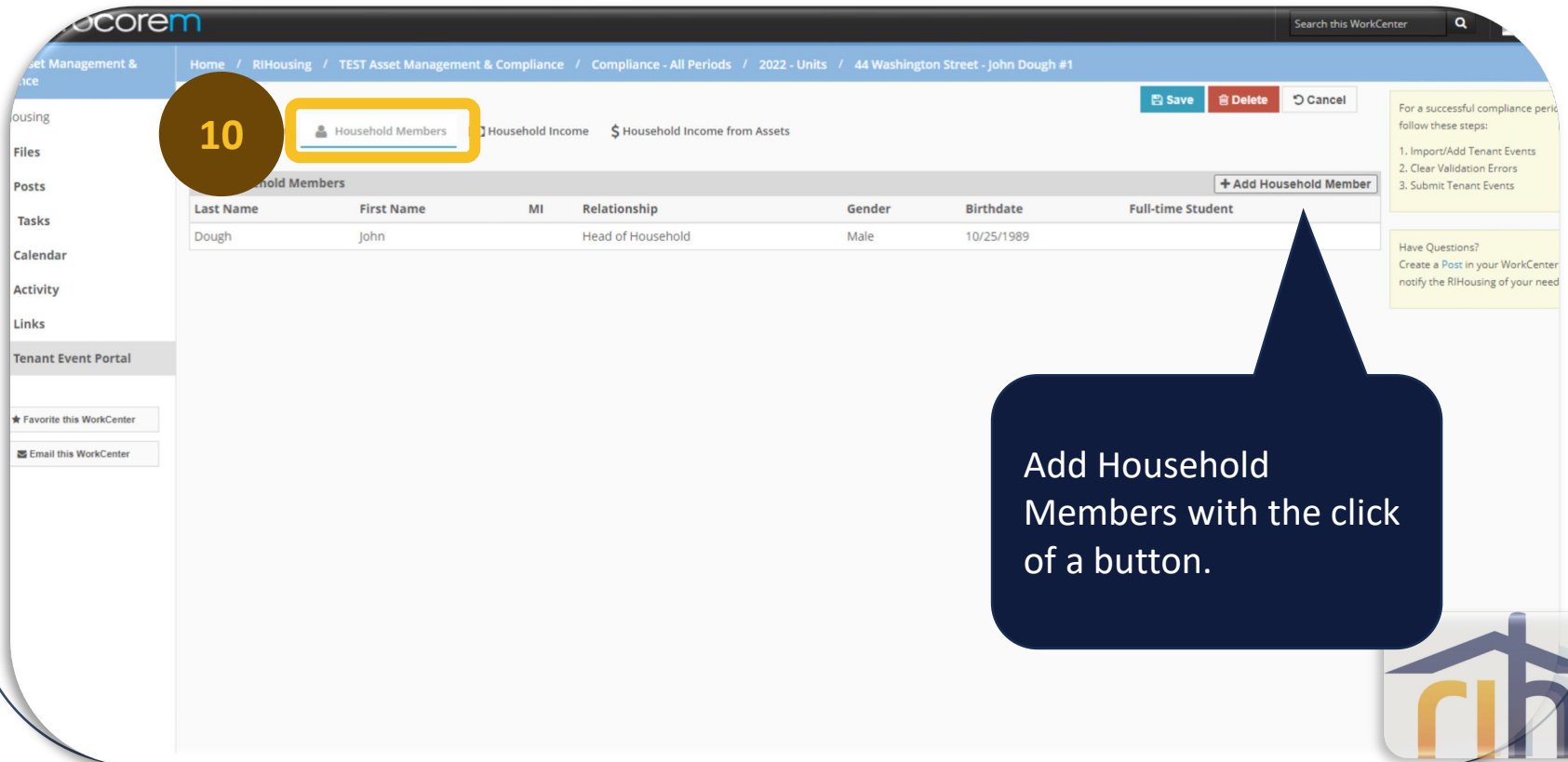
If the event is a recert or correction, household members will populate from a previous cert after Saving the current tenant event.

Greyed out fields may be editable on subsequent screens.

## Importing Tenant Events through Manual Entry

10

Select the **Household Members** tab. Add household members as necessary.



procurement

Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units / 44 Washington Street - John Dough #1

Save Delete Cancel

Household Members Household Income Household Income from Assets

Household Members + Add Household Member


| Last Name | First Name | MI | Relationship      | Gender | Birthdate  | Full-time Student |
|-----------|------------|----|-------------------|--------|------------|-------------------|
| Dough     | John       |    | Head of Household | Male   | 10/25/1989 |                   |

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 need

Add Household Members with the click of a button.



## Importing Tenant Events through Manual Entry

11

Delete former household members if applicable.



The screenshot shows the Procorem 'Household Member' form. The form includes fields for Last Name (Dough), First Name (John), Middle Initial, Relationship (Head of Household), Birthdate (10/25/1989), Gender (Male), Age At Certification (32), Social Security Number, Race (choose up to 6), and LIHTC Full-time Student. The 'Delete' button is highlighted with a yellow box, and a callout bubble points to it with the text: 'The Delete button acts as the save button.' A brown circle with the number '11' is also present over the form.

For a successful compliance period follow these steps:

1. Import/Add Tenant Events
2. Clear Validation Errors
3. Submit Tenant Events

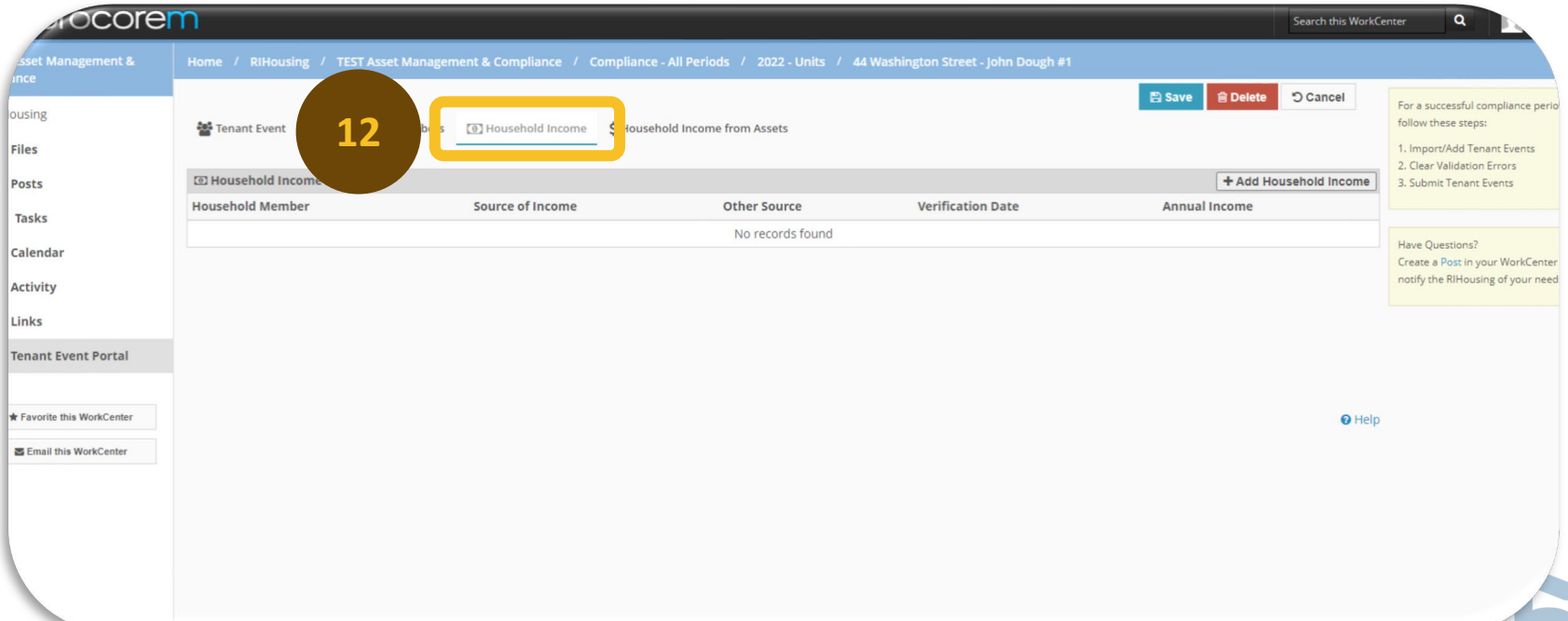
Have Questions?  
Create a Post in your WorkCenter notify the RIHousing of your need

The Delete button acts as the save button.

## Importing Tenant Events through Manual Entry

12

Select the **Household Income** tab.



The screenshot displays the Procorem Tenant Event Portal interface. The breadcrumb navigation path is: Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units / 44 Washington Street - John Dough #1. The main content area shows the 'Household Income' tab selected, with a yellow box highlighting the tab name. Below the tab, there is a table with the following columns: Household Member, Source of Income, Other Source, Verification Date, and Annual Income. The table currently displays 'No records found'. A '+ Add Household Income' button is visible in the top right corner of the table area. On the right side of the screen, there are two informational boxes: one for compliance steps and another for help/contact information.

| Household Member | Source of Income | Other Source | Verification Date | Annual Income |
|------------------|------------------|--------------|-------------------|---------------|
| No records found |                  |              |                   |               |

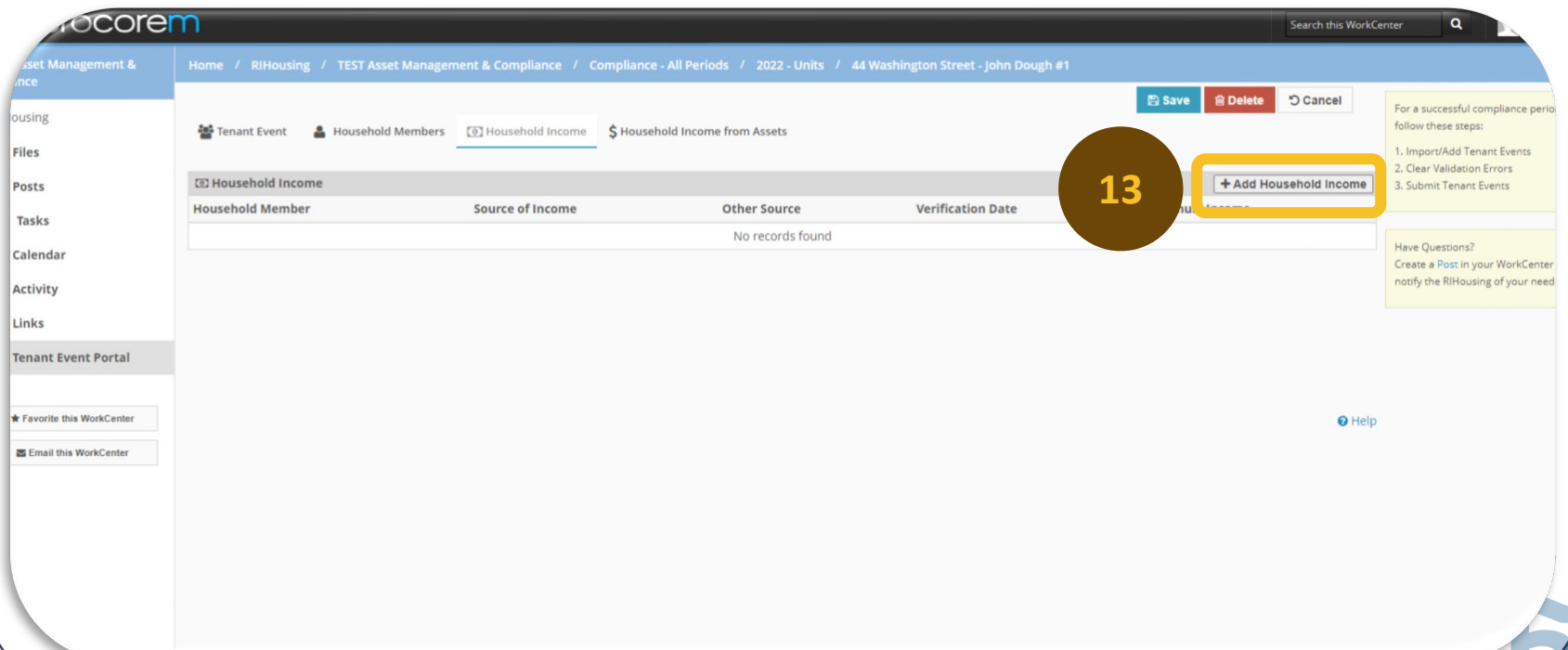
[Help](#)



## Importing Tenant Events through Manual Entry

13

+ **Add Household Income** by entering one line item for each income source for each household member.



procorem

Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units / 44 Washington Street - John Dough #1

Tenant Event Household Members Household Income Household Income from Assets

Save Delete Cancel

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  
notify the RIHousing of your need

Help

| Household Member | Source of Income | Other Source | Verification Date |
|------------------|------------------|--------------|-------------------|
| No records found |                  |              |                   |

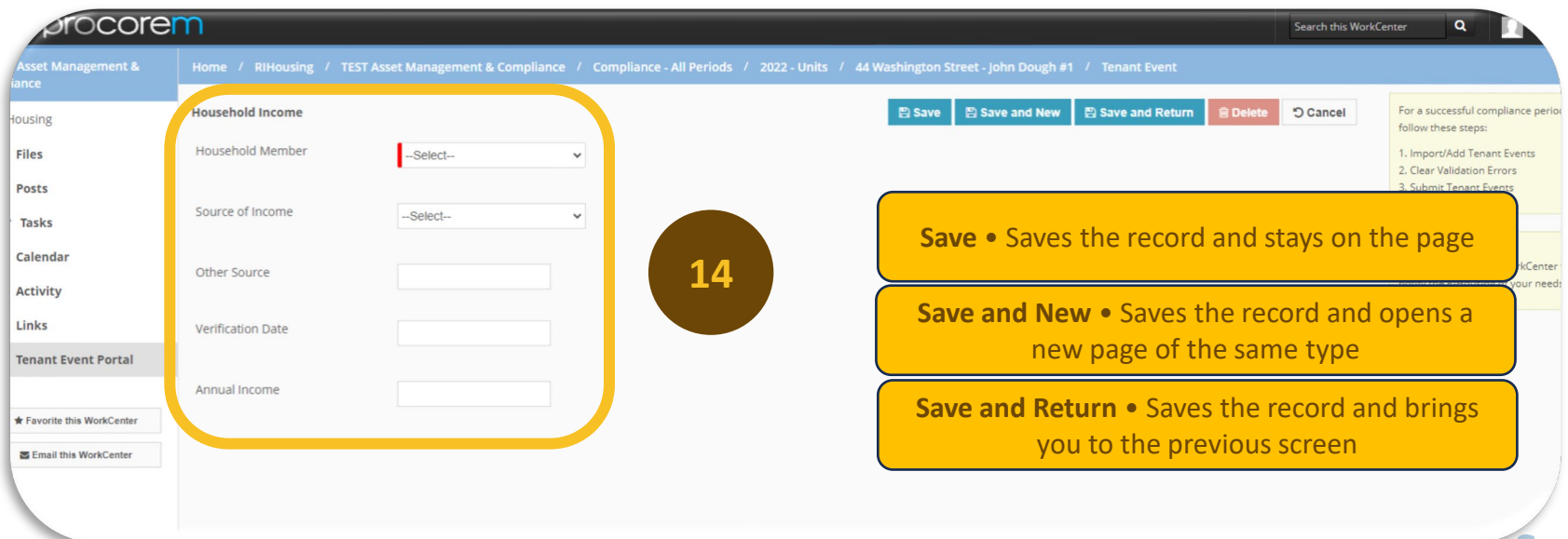
13

+ Add Household Income

## Importing Tenant Events through Manual Entry

14

Complete one Household Income record for each household member and each income source. **Save** after each entry until all income has been captured in the tenant event summary page. **Save and Return**.



procorem

Search this WorkCenter

Asset Management & Compliance

Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units / 44 Washington Street - John Dough #1 / Tenant Event

Household Income

Household Member

Source of Income

Other Source

Verification Date

Annual Income

For a successful compliance period follow these steps:

1. Import/Add Tenant Events
2. Clear Validation Errors
3. Submit Tenant Events

14

**Save** • Saves the record and stays on the page

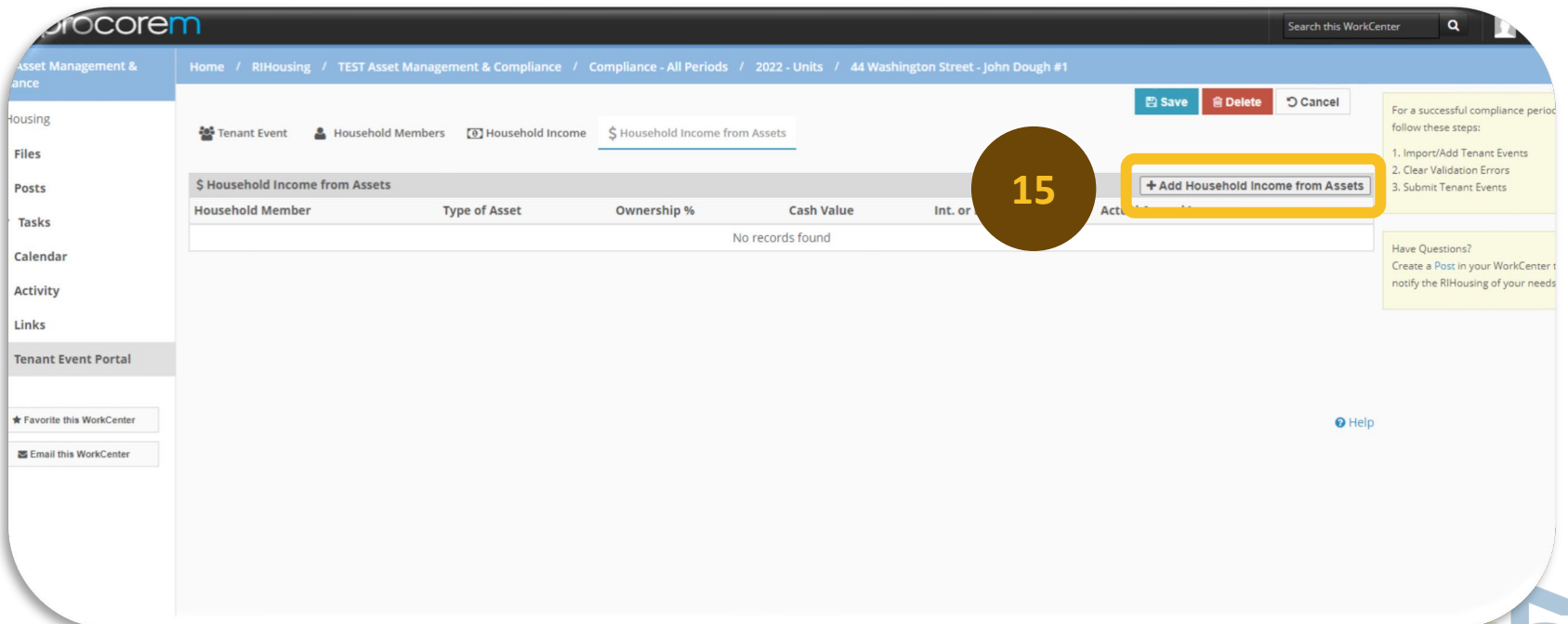
**Save and New** • Saves the record and opens a new page of the same type

**Save and Return** • Saves the record and brings you to the previous screen

## Importing Tenant Events through Manual Entry

15

+ Add Household Income from Assets by entering one line item for each asset source for each household member.

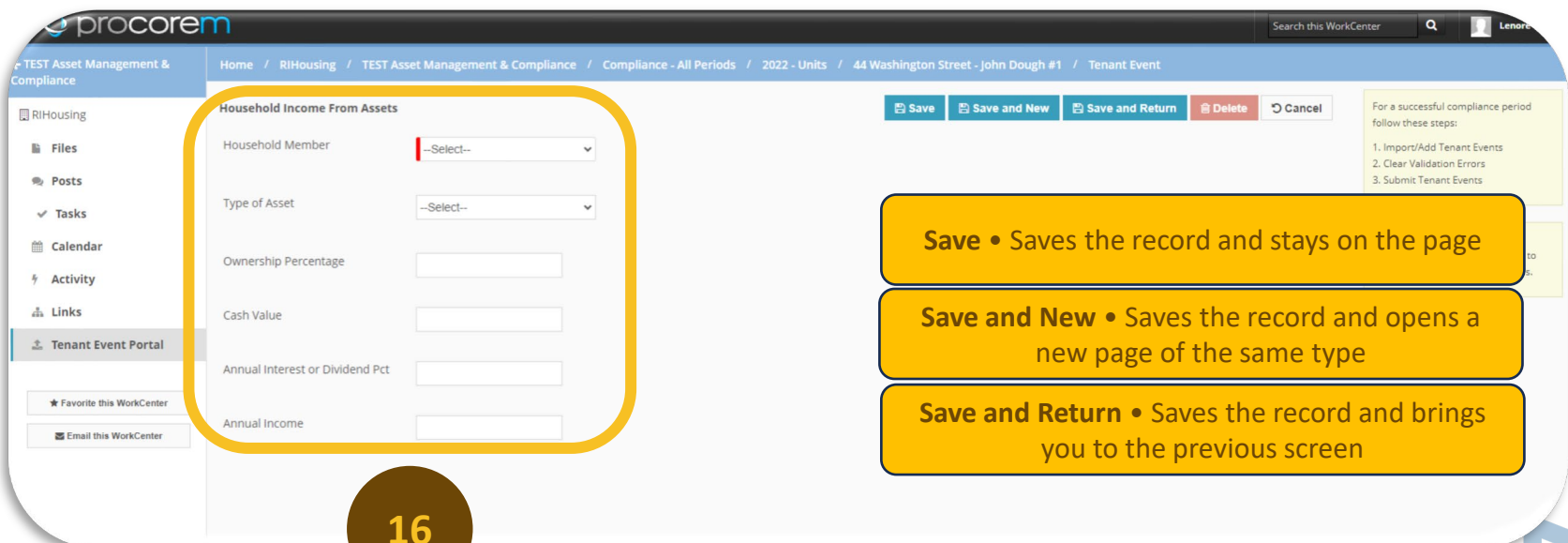


The screenshot shows the Procorem software interface. The breadcrumb navigation is: Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units / 44 Washington Street - John Dough #1. The page title is '\$ Household Income from Assets'. There are buttons for Save, Delete, and Cancel. A table with columns Household Member, Type of Asset, Ownership %, Cash Value, Int. or, and Act. is shown, with 'No records found' below it. A yellow box highlights the '+ Add Household Income from Assets' button. A brown circle with the number '15' is overlaid on the button. On the right, there is a yellow box with instructions: 'For a successful compliance period follow these steps: 1. Import/Add Tenant Events, 2. Clear Validation Errors, 3. Submit Tenant Events.' Below that is a 'Have Questions?' section with a 'Help' link.

## Importing Tenant Events through Manual Entry

16

Complete one Household Income from Assets record for each household member and each asset source. **Save** after each entry until all income has been captured in the tenant event summary page. **Save and Return**.



procorem

Search this WorkCenter

Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units / 44 Washington Street - John Dough #1 / Tenant Event

Save Save and New Save and Return Delete Cancel

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

Household Income From Assets

Household Member --Select--

Type of Asset --Select--

Ownership Percentage

Cash Value

Annual Interest or Dividend Pct

Annual Income

Save • Saves the record and stays on the page

Save and New • Saves the record and opens a new page of the same type

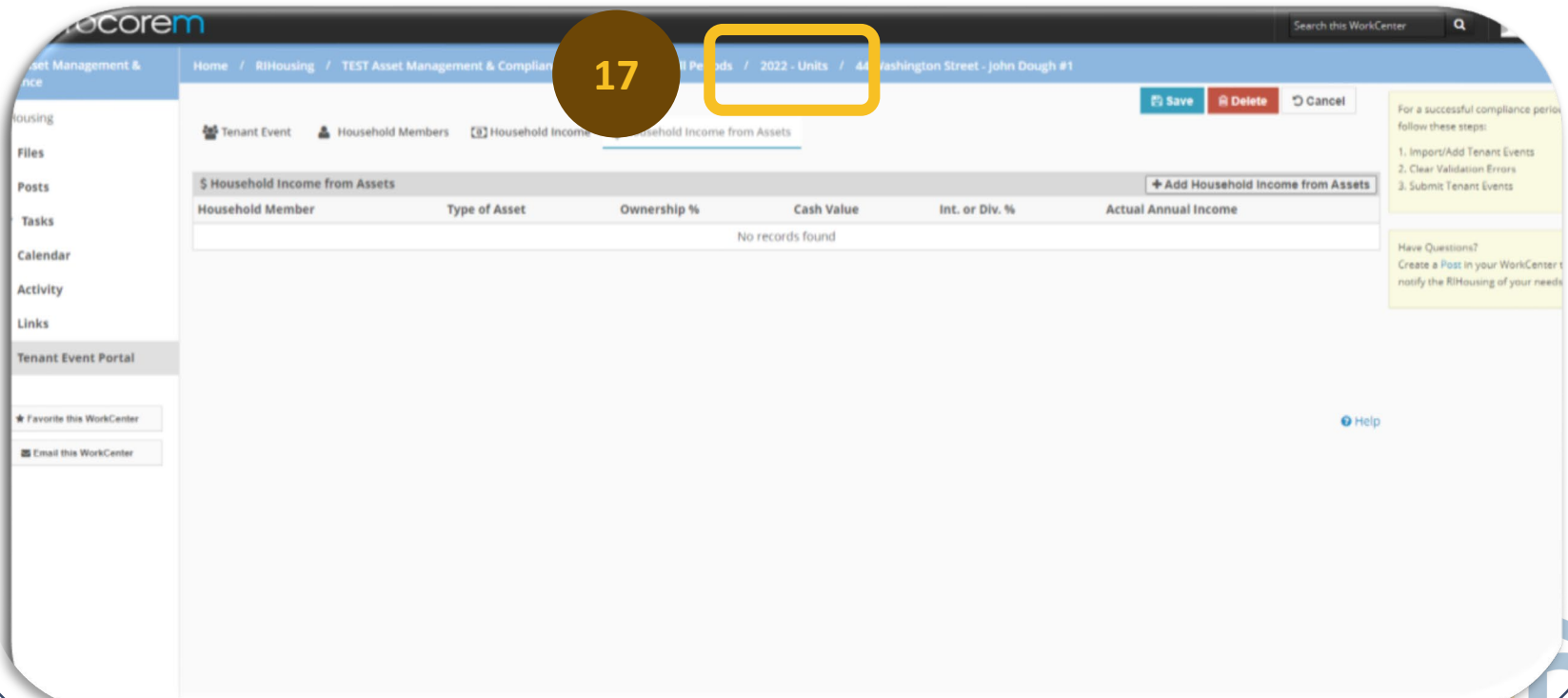
Save and Return • Saves the record and brings you to the previous screen

16

## Importing Tenant Events through Manual Entry

17

After all tenant events have been entered, click on the breadcrumb with **Year – Units** to return to the Compliance Period page for the selected year.



procurement

Home / RI Housing / TEST Asset Management & Compliance / Compliance Periods / 2022 - Units / 44 Washington Street - John Dough #1

Tenant Event Household Members Household Income from Assets

\$ Household Income from Assets + Add Household Income from Assets

| Household Member | Type of Asset | Ownership % | Cash Value | Int. or Div. % | Actual Annual Income |
|------------------|---------------|-------------|------------|----------------|----------------------|
| No records found |               |             |            |                |                      |

Save Delete Cancel

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

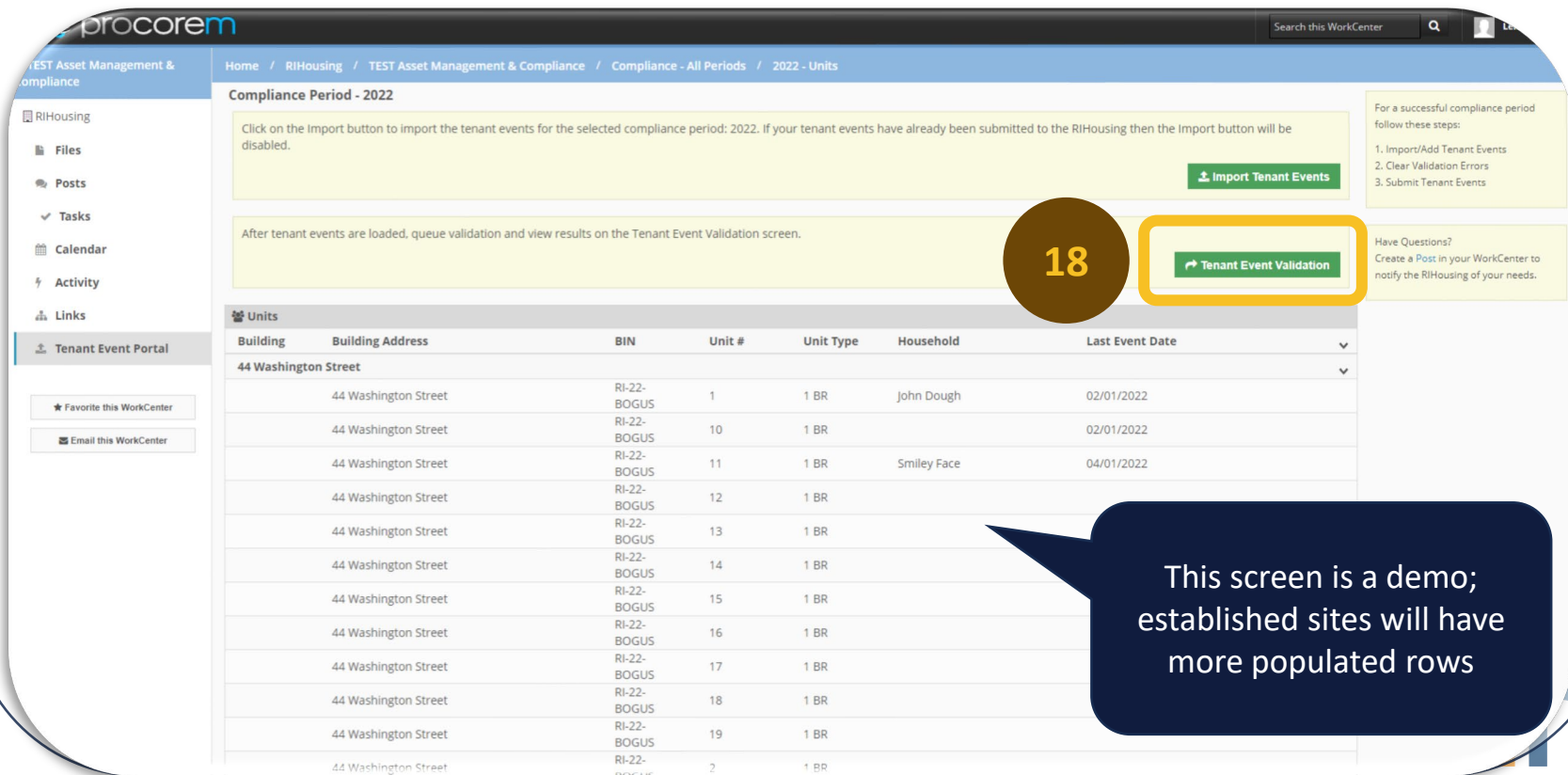
Have Questions?  
Create a Post in your WorkCenter to notify the RI Housing of your needs

Help

# Importing Tenant Events through Manual Entry

18

Click the **Tenant Event Validation** Button



Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units

**Compliance Period - 2022**

Click on the Import button to import the tenant events for the selected compliance period: 2022. If your tenant events have already been submitted to the RIHousing then the Import button will be disabled.

After tenant events are loaded, queue validation and view results on the Tenant Event Validation screen.

**18** [Tenant Event Validation](#)

**Units**

| Building             | Building Address     | BIN         | Unit # | Unit Type | Household   | Last Event Date |
|----------------------|----------------------|-------------|--------|-----------|-------------|-----------------|
| 44 Washington Street |                      |             |        |           |             |                 |
|                      | 44 Washington Street | RI-22-BOGUS | 1      | 1 BR      | John Dough  | 02/01/2022      |
|                      | 44 Washington Street | RI-22-BOGUS | 10     | 1 BR      |             | 02/01/2022      |
|                      | 44 Washington Street | RI-22-BOGUS | 11     | 1 BR      | Smiley Face | 04/01/2022      |
|                      | 44 Washington Street | RI-22-BOGUS | 12     | 1 BR      |             |                 |
|                      | 44 Washington Street | RI-22-BOGUS | 13     | 1 BR      |             |                 |
|                      | 44 Washington Street | RI-22-BOGUS | 14     | 1 BR      |             |                 |
|                      | 44 Washington Street | RI-22-BOGUS | 15     | 1 BR      |             |                 |
|                      | 44 Washington Street | RI-22-BOGUS | 16     | 1 BR      |             |                 |
|                      | 44 Washington Street | RI-22-BOGUS | 17     | 1 BR      |             |                 |
|                      | 44 Washington Street | RI-22-BOGUS | 18     | 1 BR      |             |                 |
|                      | 44 Washington Street | RI-22-BOGUS | 19     | 1 BR      |             |                 |
|                      | 44 Washington Street | RI-22-BOGUS | 2      | 1 BR      |             |                 |

For a successful compliance period follow these steps:

1. Import/Add Tenant Events
2. Clear Validation Errors
3. Submit Tenant Events

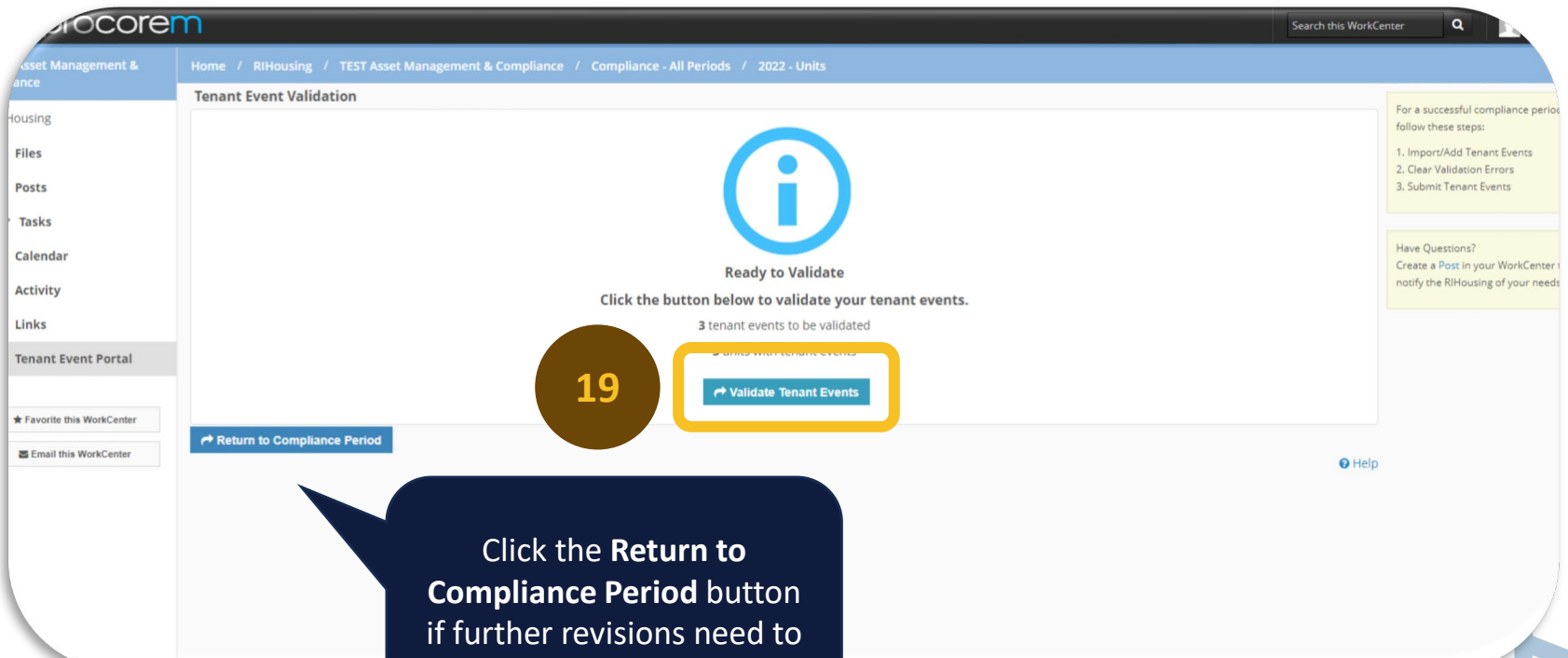
Have Questions?  
Create a Post in your WorkCenter to notify the RIHousing of your needs.

This screen is a demo; established sites will have more populated rows

# Importing Tenant Events through Manual Entry

19

Select **Validate Tenant Events**.



The screenshot shows the Procurement Tenant Event Validation interface. The breadcrumb trail is: Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units. The page title is "Tenant Event Validation". A central information icon is displayed above the text "Ready to Validate". Below this, it says "Click the button below to validate your tenant events." and "3 tenant events to be validated". A blue button labeled "Validate Tenant Events" is highlighted with a yellow box. A dark blue callout bubble points to a blue button labeled "Return to Compliance Period" at the bottom left of the main content area. On the right side, there are two yellow boxes: one with a 3-step process (1. Import/Add Tenant Events, 2. Clear Validation Errors, 3. Submit Tenant Events) and another with "Have Questions? Create a Post in your WorkCenter to notify the RIHousing of your needs". A "Help" link is visible at the bottom right.

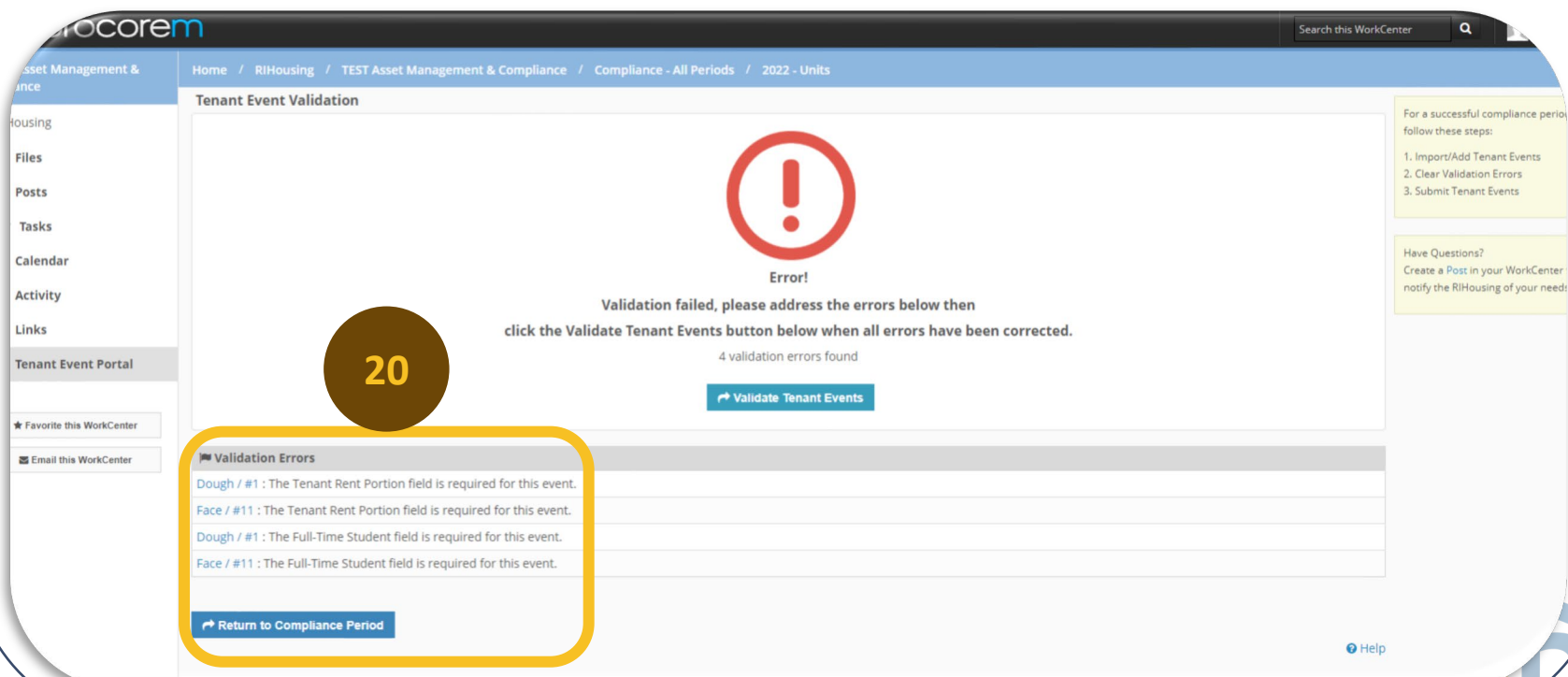
19

Click the **Return to Compliance Period** button if further revisions need to be made.

## Importing Tenant Events through Manual Entry

20

Clear Validation Errors by correcting the fields in the error menu. Click the **Return to Compliance Period** button to make the necessary adjustments. Repeat steps 18 and 19.



The screenshot shows the Procorem Tenant Event Validation interface. The breadcrumb trail is: Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units. The page title is "Tenant Event Validation". A large red exclamation mark icon is centered on the page with the text "Error!". Below the icon, it says "Validation failed, please address the errors below then click the Validate Tenant Events button below when all errors have been corrected." and "4 validation errors found". A blue button labeled "Validate Tenant Events" is visible. A yellow callout box highlights a "Validation Errors" section containing four error messages: "Dough / #1 : The Tenant Rent Portion field is required for this event.", "Face / #11 : The Tenant Rent Portion field is required for this event.", "Dough / #1 : The Full-Time Student field is required for this event.", and "Face / #11 : The Full-Time Student field is required for this event.". A blue button labeled "Return to Compliance Period" is located at the bottom of the error list. On the right side of the interface, there are two informational 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 suggesting to create a post in the WorkCenter.

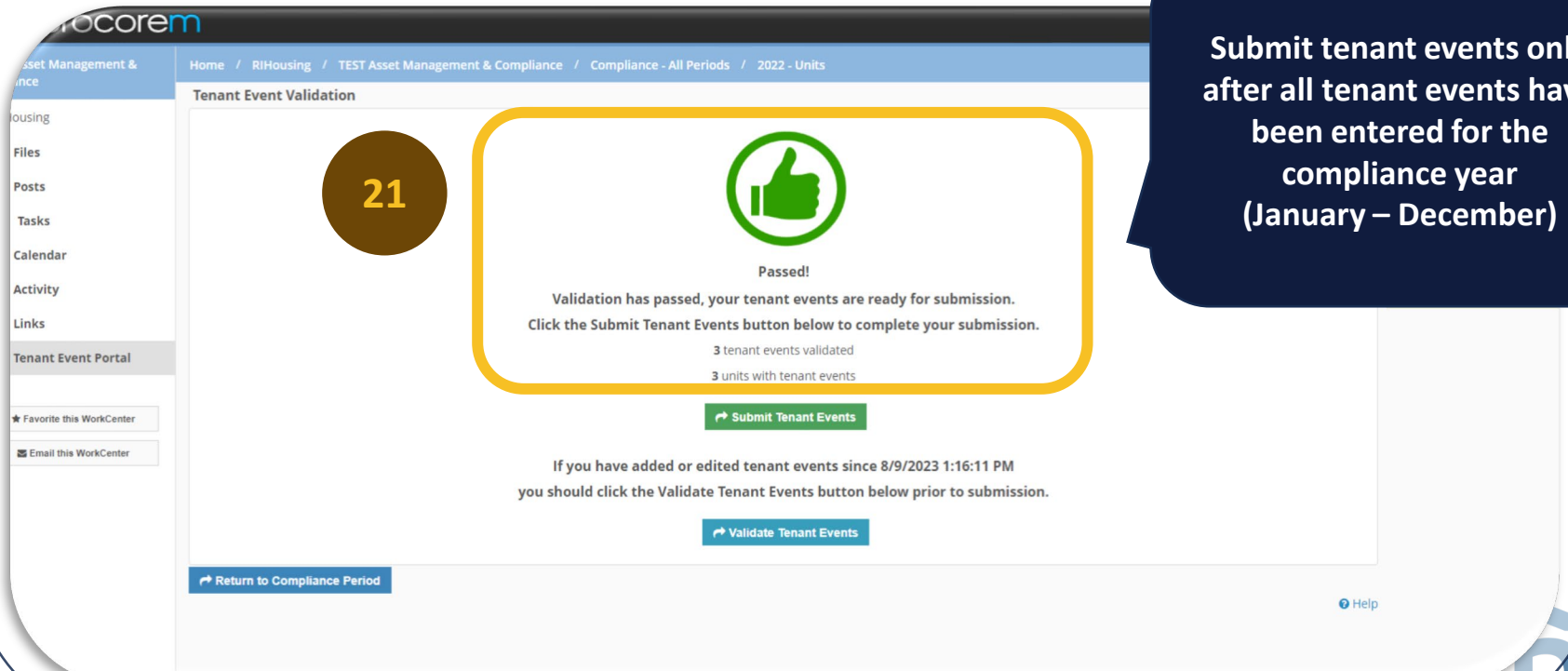
20



## Importing Tenant Events through Manual Entry

21

When you get the thumbs up, do a happy dance!



The screenshot shows the Procorem Tenant Event Validation page. The page title is "Tenant Event Validation". The breadcrumb trail is "Home / RIHousing / TEST Asset Management & Compliance / Compliance - All Periods / 2022 - Units". The page content includes a green thumbs up icon in a circle, the text "Passed!", and the message "Validation has passed, your tenant events are ready for submission. Click the Submit Tenant Events button below to complete your submission." Below this message, it shows "3 tenant events validated" and "3 units with tenant events". There is a green "Submit Tenant Events" button. Below that, it says "If you have added or edited tenant events since 8/9/2023 1:16:11 PM you should click the Validate Tenant Events button below prior to submission." and there is a blue "Validate Tenant Events" button. At the bottom left, there is a blue "Return to Compliance Period" button. At the bottom right, there is a "Help" link.

Submit tenant events only after all tenant events have been entered for the compliance year (January – December)

21



Passed!

Validation has passed, your tenant events are ready for submission.  
Click the Submit Tenant Events button below to complete your submission.

3 tenant events validated

3 units with tenant events

[Submit Tenant Events](#)

If you have added or edited tenant events since 8/9/2023 1:16:11 PM  
you should click the Validate Tenant Events button below prior to submission.

[Validate Tenant Events](#)

[Return to Compliance Period](#)

[Help](#)

## 2022 Tenant Event Update Notes

- Tenant event data that was reported to RIHousing prior to November 7, 2022 was migrated into ProLink.
- Must be updated before working on the 2023 Compliance Year
- The deadline for updating the 2022 Tenant Events is September 15, 2023
- Each compliance workcenter comes with a detailed list of the property name, BIN, building name (address), and unit number

## 2022 Tenant Event Update for Sites Using XML Upload

1. Generate the 2022 XML file from 1/1/22 – 12/31/22 from your property management software
2. Upload the 2022 XML file into the Tenant Event Portal
3. Validate the tenant event update and address errors as necessary
4. Submit after errors are cleared

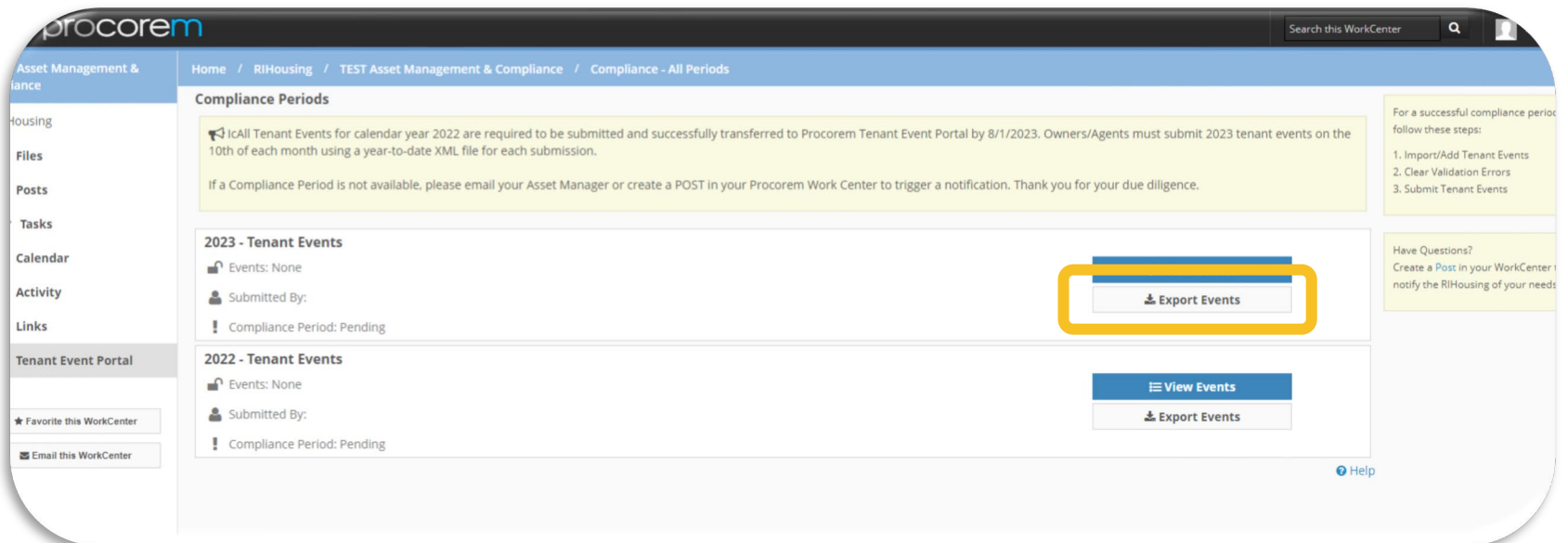


## 2022 Tenant Event Update for Sites Doing Manual Entry

1. Review the existing certifications in Procorem
2. Enter any tenant events that have not been captured
3. Validate the tenant event update and address errors as necessary
4. Submit after errors are cleared

## 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*



## Tasks

In addition to the monthly tenant event update, management agents responsible for updating tenant events must complete the corresponding tasks in Procorem by marking them **Complete** by checking the boxes for the month.

### Edit Task

[Main](#) | [\(0\) Comments](#) | [\(2\) Reminders](#) | [\(0\) Files](#) | [Activities](#)

**Task Title**: 1.01 • 2022 Tenant Event Update

**Status**: Pending Assignees  
Task is unassigned

Mark as Completed

**Task Group**: [2023] 1 • Tenant Event Update

**Description**: Upload the 2022 Tenant Event XML File into Tenant Event Portal or enter certifications manually. Mark this task as complete after a successful update. Use the Comments tab above to communicate errors with RIHousing staff.

**Location**: Tenant Event Portal

**Start Date**: 08/24/2023 12:00 AM

**Due Date**: 09/15/2023 5:00 PM

Using (UTC-05:00) Eastern Time (US & Canada). Click [here](#) to change your time zone.

**Assigned To**:
 

| Assignees        | x |
|------------------|---|
| Management Agent | x |
| Owner/Agent      | x |
| Property Manager | x |

### Tasks

[View: Task Group](#) | [Show Completed](#) | [Hide](#)

**[2023] 1 • Tenant Event Update**

|                                     |   |   |
|-------------------------------------|---|---|
| <input checked="" type="checkbox"/> | <b>1.01 • 2022 Tenant Event Update</b> 2  | <a href="#">Due in 15 days (Sep 15, 2023, 05:00 PM EDT)</a> |
| <input checked="" type="checkbox"/> | <b>1.02 • Validate 2022 Tenant Events</b> | <a href="#">Due in 15 days (Sep 15, 2023, 05:00 PM EDT)</a> |
| <input checked="" type="checkbox"/> | <b>1.03 • Submit 2022 Tenant Events</b> 2 | <a href="#">Due in 15 days (Sep 15, 2023, 05:00 PM EDT)</a> |



## 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 Help





# Questions



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