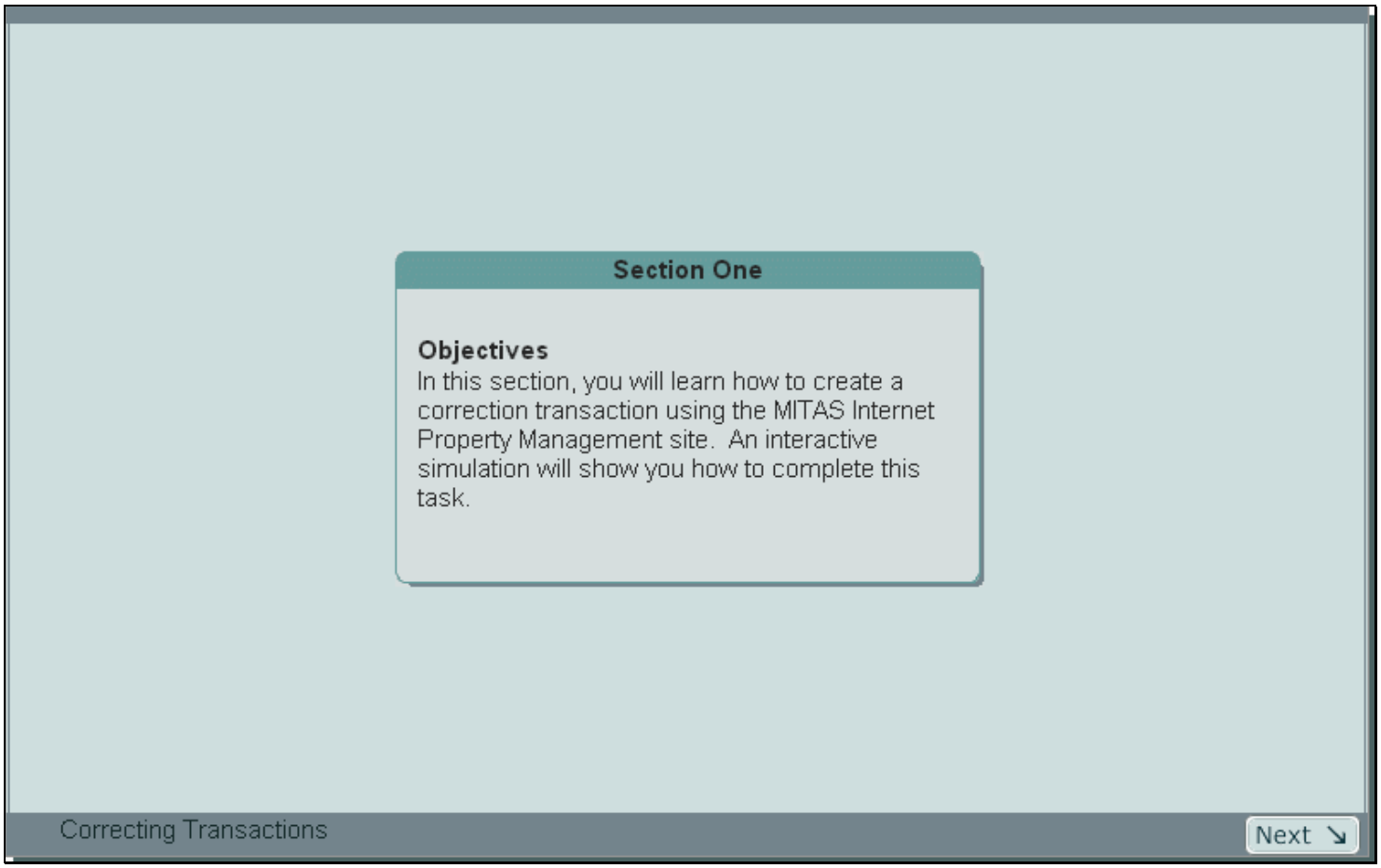
Slide 1 - Title

Text Captions

Creating a Correction Transaction

Notes

Slide 2 - Objectives



Text Captions

Section One

Objectives
In this section, you will learn how to create a correction transaction using the MITAS Internet Property Management site. An interactive simulation will show you how to complete this task.

Notes

Slide 3 - Scenario

Text Captions

Scenario

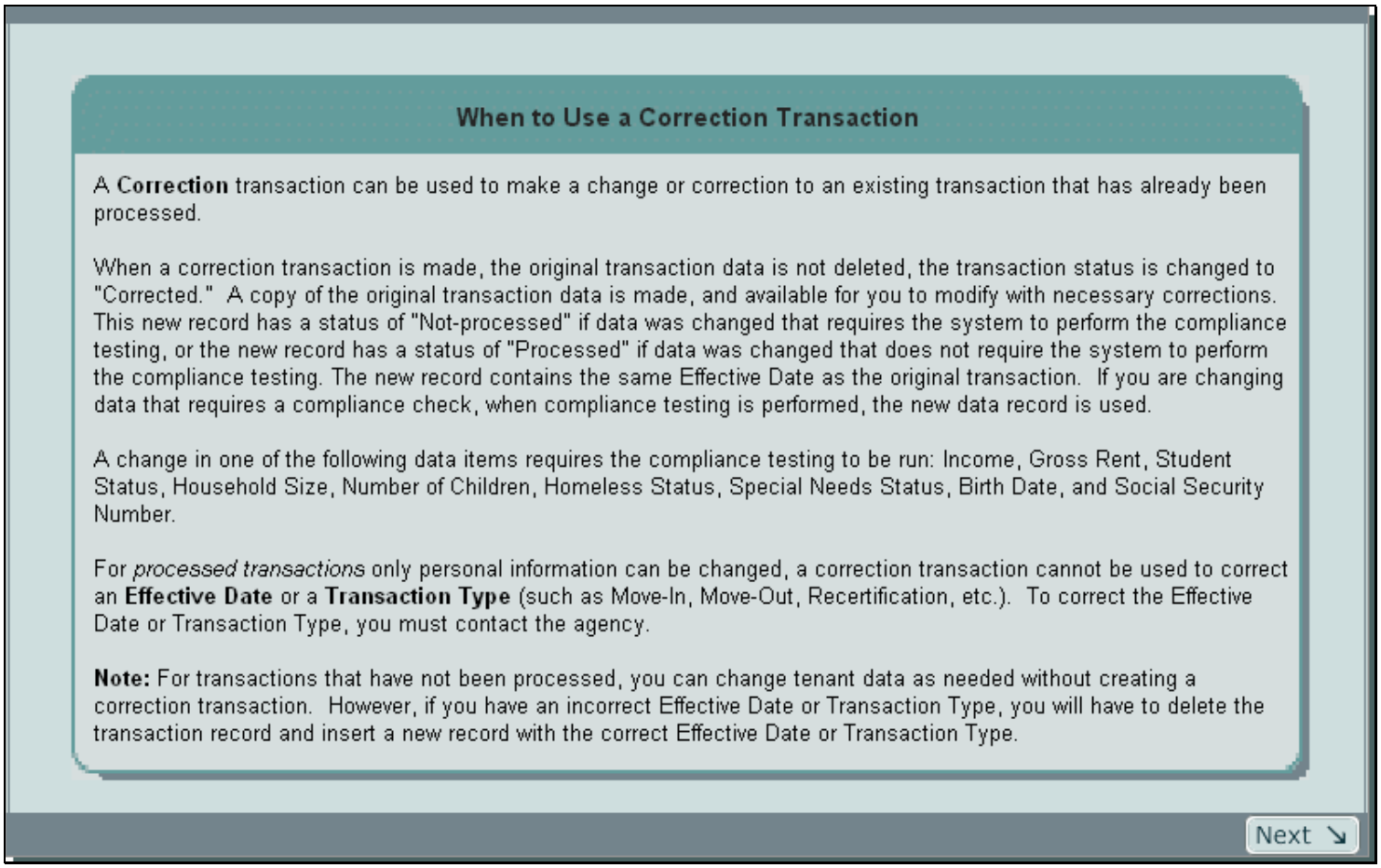
Doug, a property manager calls you...

"Hi Becky, I need to make a correction to a transaction in Mason Ridge on the MITAS Internet Property Management site for the first time. How do I do this?"

Let's find out how we can help Doug.

Notes

Slide 4 - Definition



Text Captions

When to Use a Correction Transaction

A **Correction** transaction can be used to make a change or correction to an existing transaction that has already been processed.

When a correction transaction is made, the original transaction data is not deleted, the transaction status is changed to "Corrected." A copy of the original transaction data is made, and available for you to modify with necessary corrections. This new record has a status of "Not-processed" if data was changed that requires the system to perform the compliance testing, or the new record has a status of "Processed" if data was changed that does not require the system to perform the compliance testing. The new record contains the same Effective Date as the original transaction. If you are changing data that requires a compliance check, when compliance testing is performed, the new data record is used.

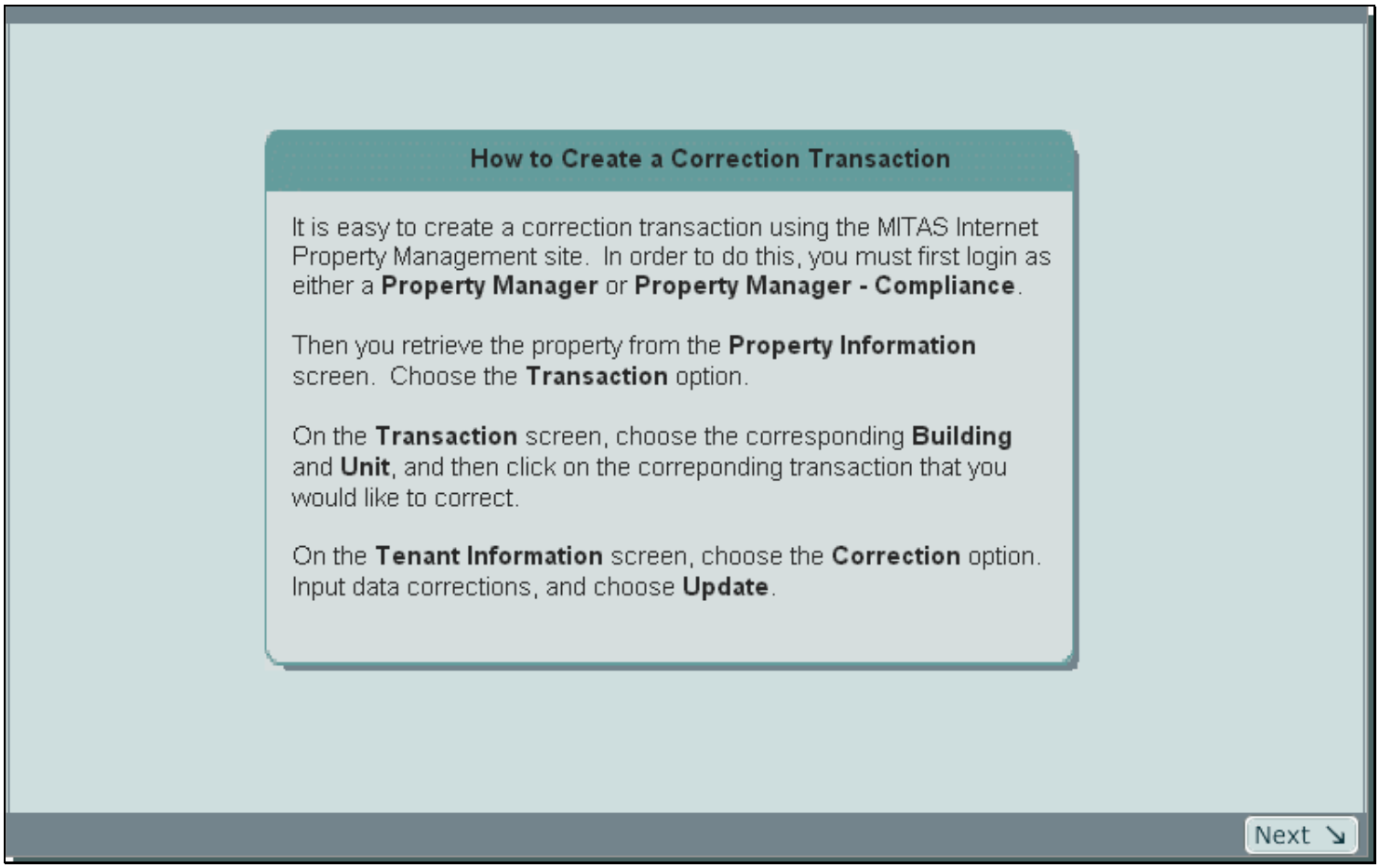
A change in one of the following data items requires the compliance testing to be run: Income, Gross Rent, Student Status, Household Size, Number of Children, Homeless Status, Special Needs Status, Birth Date, and Social Security Number.

For *processed transactions* only personal information can be changed, a correction transaction cannot be used to correct an **Effective Date** or a **Transaction Type** (such as Move-In, Move-Out, Recertification, etc.). To correct the Effective Date or Transaction Type, you must contact the agency.

Note: For transactions that have not been processed, you can change tenant data as needed without creating a correction transaction. However, if you have an incorrect Effective Date or Transaction Type, you will have to delete the transaction record and insert a new record with the correct Effective Date or Transaction Type.

Notes

Slide 5 - Concept



Text Captions

How to Create a Correction Transaction

It is easy to create a correction transaction using the MITAS Internet Property Management site. In order to do this, you must first login as either a **Property Manager** or **Property Manager - Compliance**.

Then you retrieve the property from the **Property Information** screen. Choose the **Transaction** option.

On the **Transaction** screen, choose the corresponding **Building** and **Unit**, and then click on the correponding transaction that you would like to correct.

On the **Tenant Information** screen, choose the **Correction** option. Input data corrections, and choose **Update**.

Notes

Slide 6 - Simulation

Text Captions

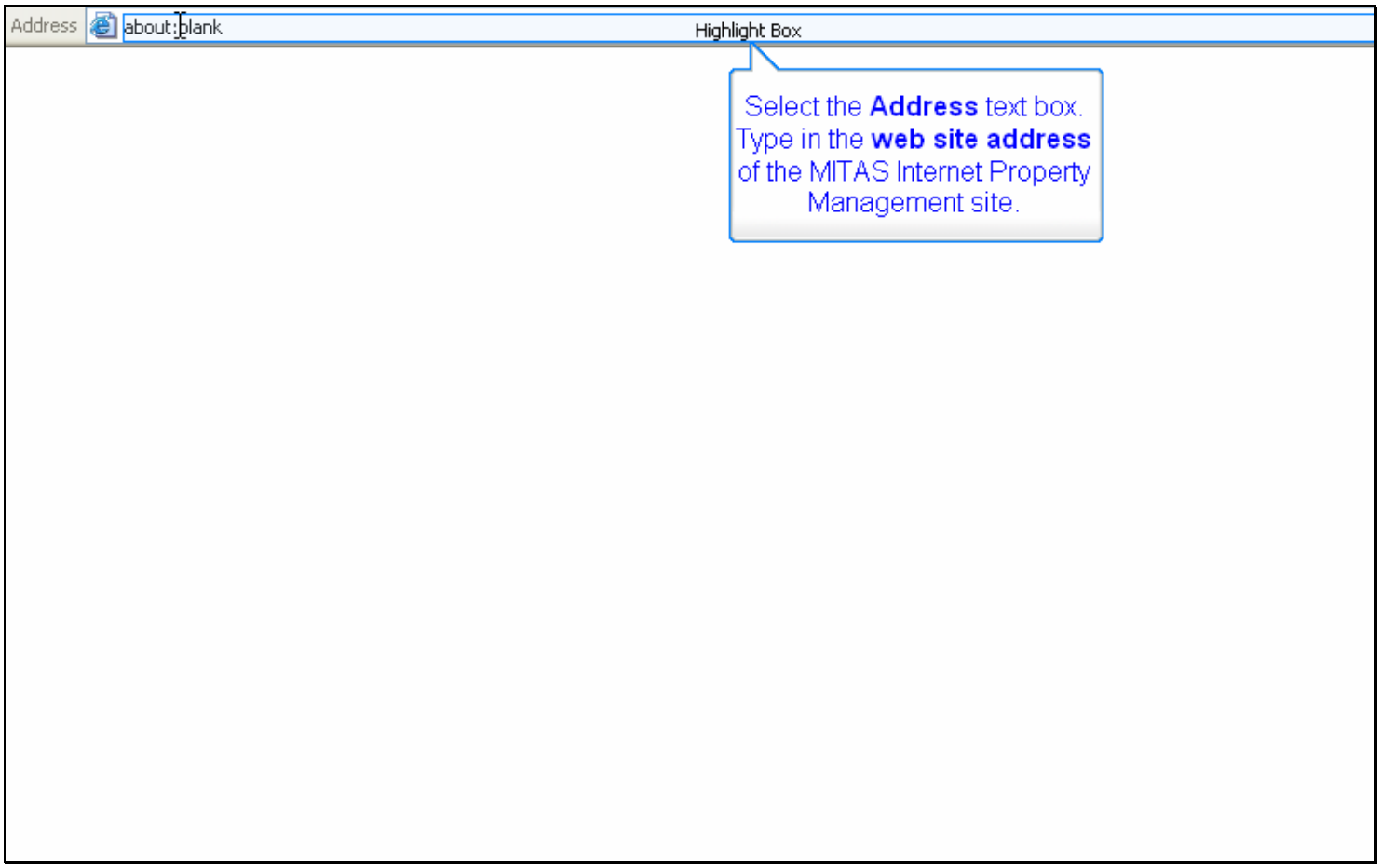
Simulation

Creating a Correction Transaction

The following simulation takes you through the steps needed to create a correction transaction using the MITAS Internet Property Management site. You will be shown the appropriate steps to follow.

Notes

Slide 7 - Slide 7

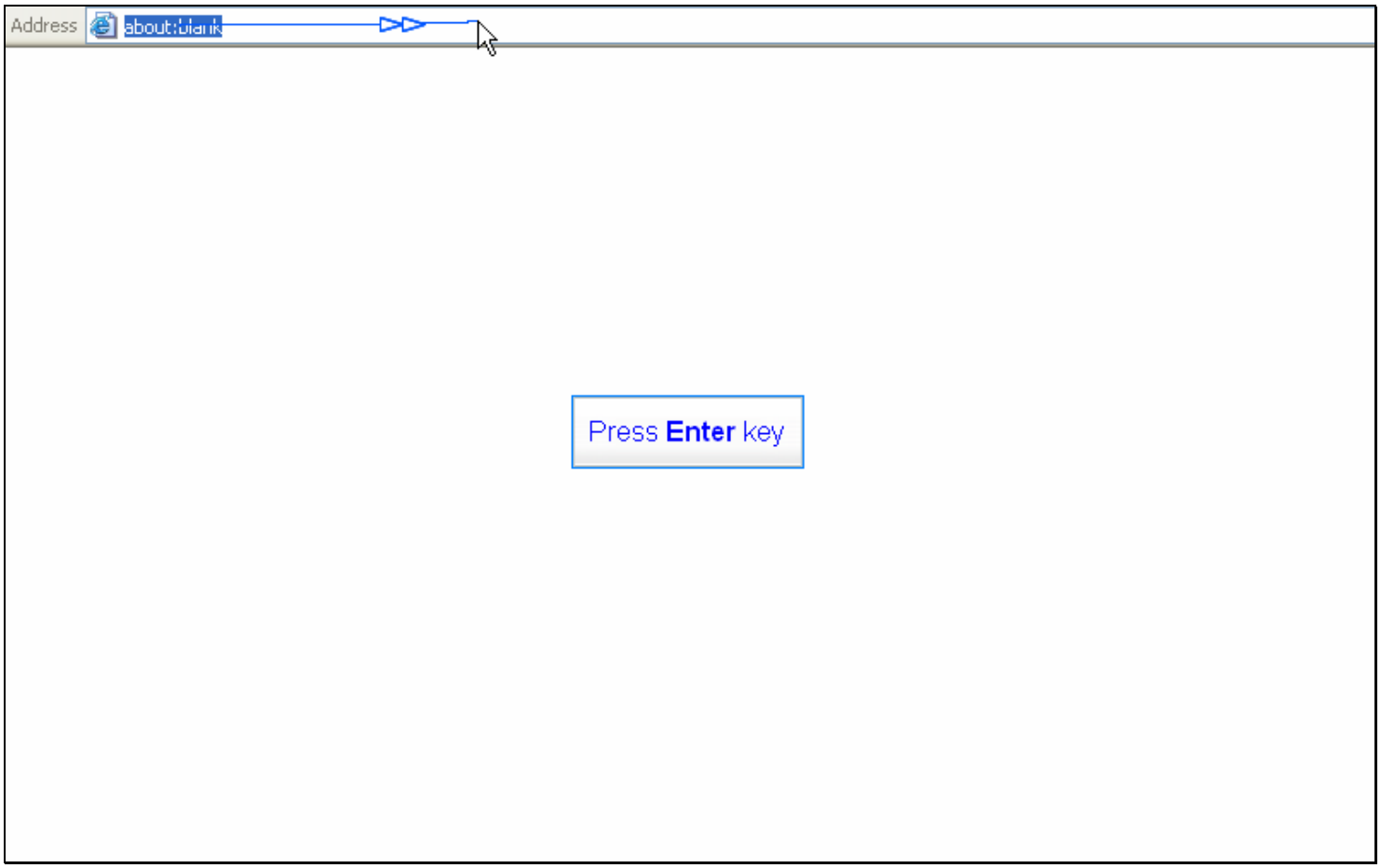


Text Captions

Select the **Address** text box. Type in the **web site address** of the MITAS Internet Property Management site.

Notes

Slide 8 - Slide 8

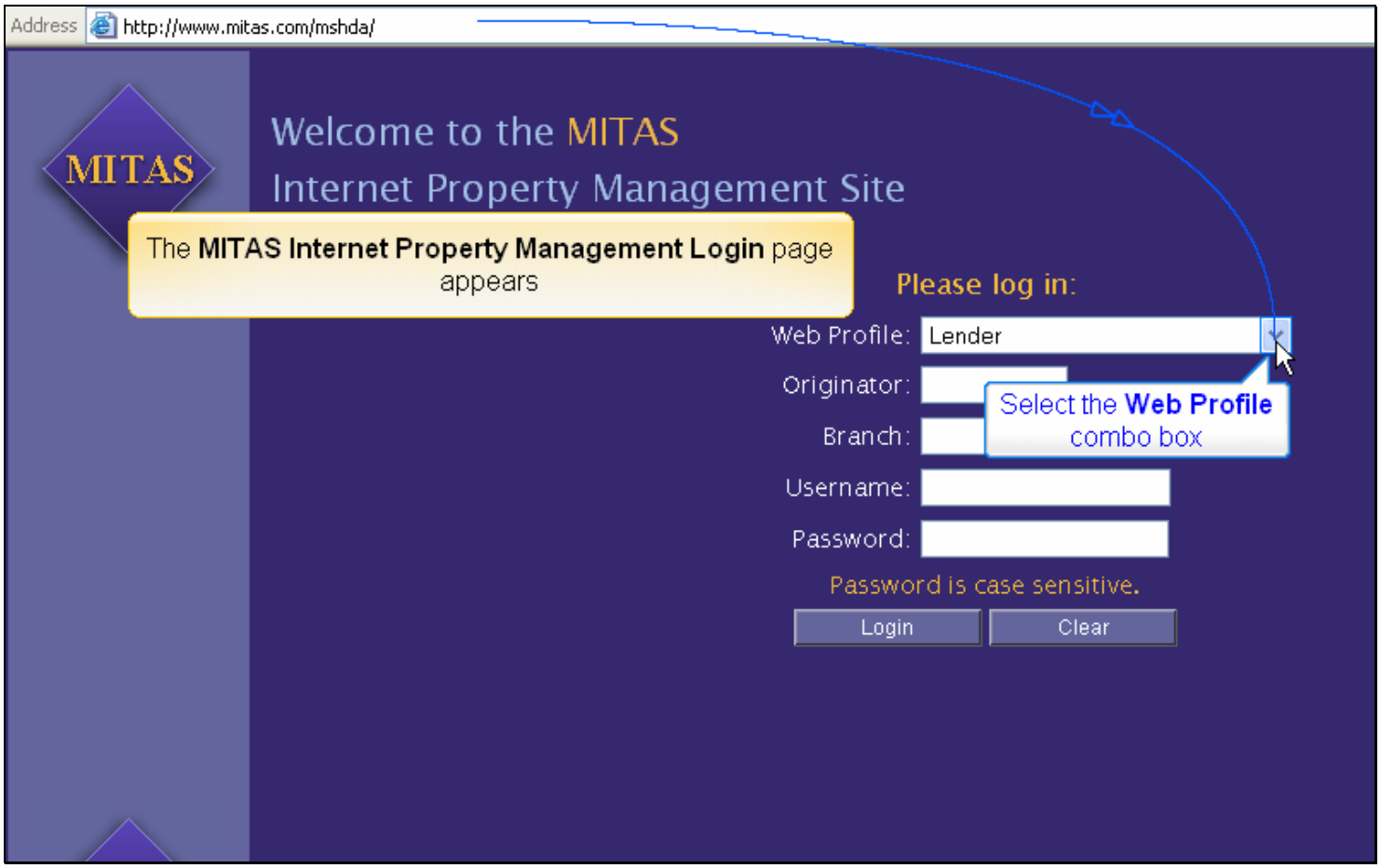


Text Captions

Press **Enter** key

Notes

Slide 10 - Slide 10



Text Captions

The **MITAS Internet Property Management Login** page appears

Select the **Web Profile** combo box

Notes

Slide 11 - Slide 11

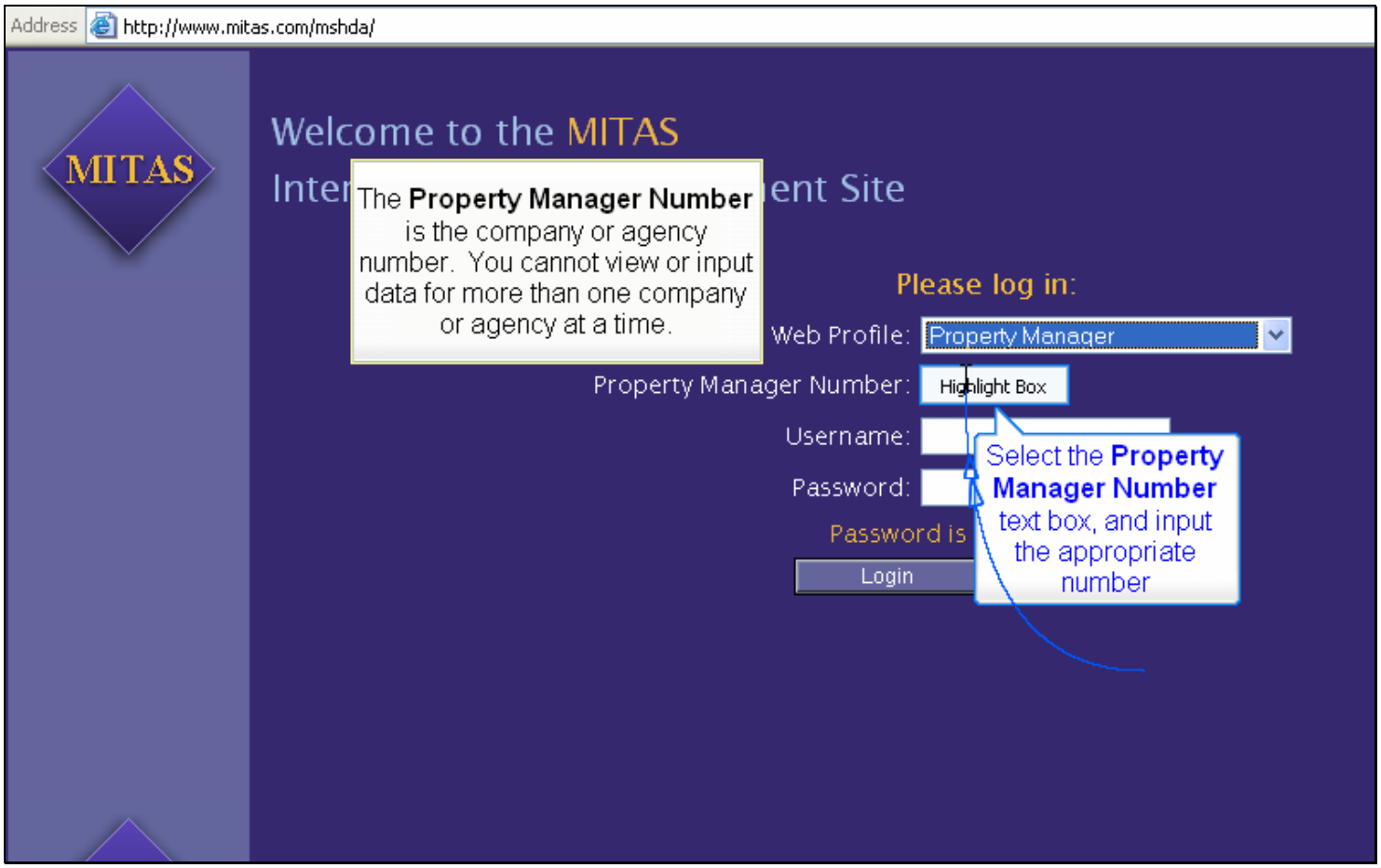
Text Captions

Select the appropriate **Property Manager** item (Property Manager or Property Manager - Compliance)

Depending on the way your agency is set up, there are two valid Property Manager items that you could choose: **Property Manager** or **Property Manager - Compliance**. A **Property Manager** can view and input data for both compliance and financials. A **Property Manager - Compliance** can view and input data for only compliance. Your agency may have established both types of property manager items or only one option may be valid.

Notes

Slide 12 - Slide 12



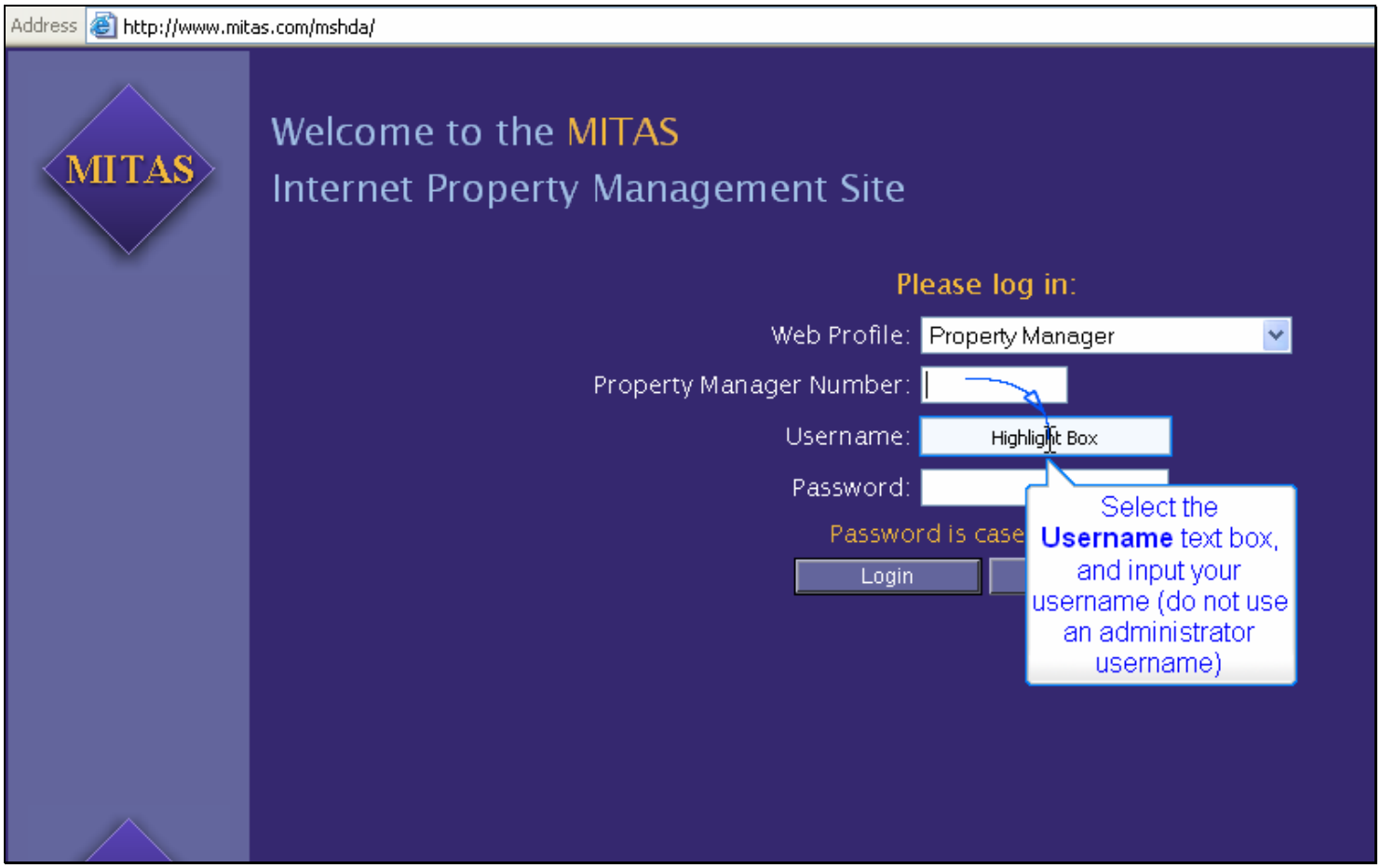
Text Captions

Select the **Property Manager Number** text box, and input the appropriate number

The **Property Manager Number** is the company or agency number. You cannot view or input data for more than one company or agency at a time.

Notes

Slide 13 - Slide 13

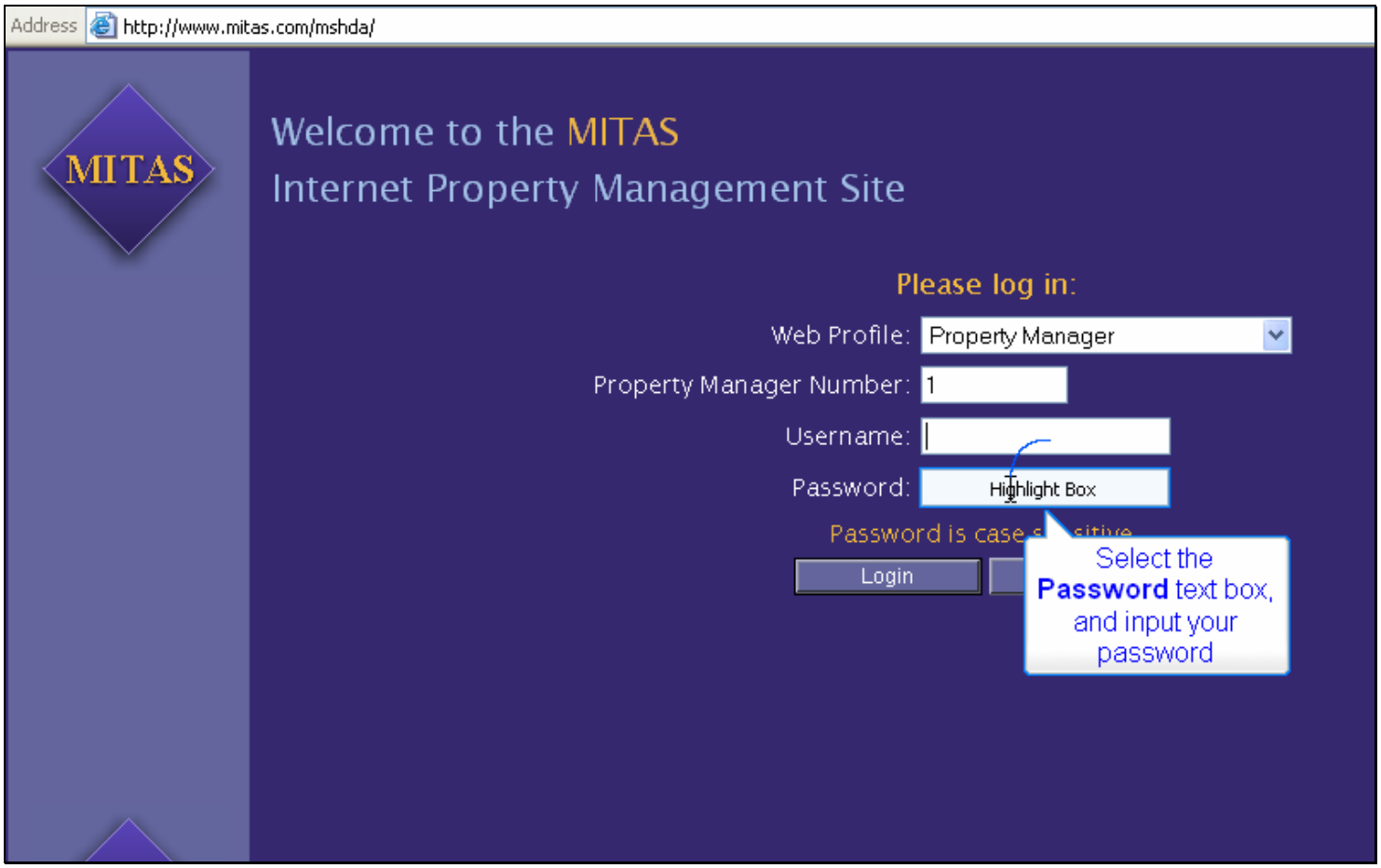


Text Captions

Select the **Username** text box, and input your username (do not use an administrator username)

Notes

Slide 14 - Slide 14

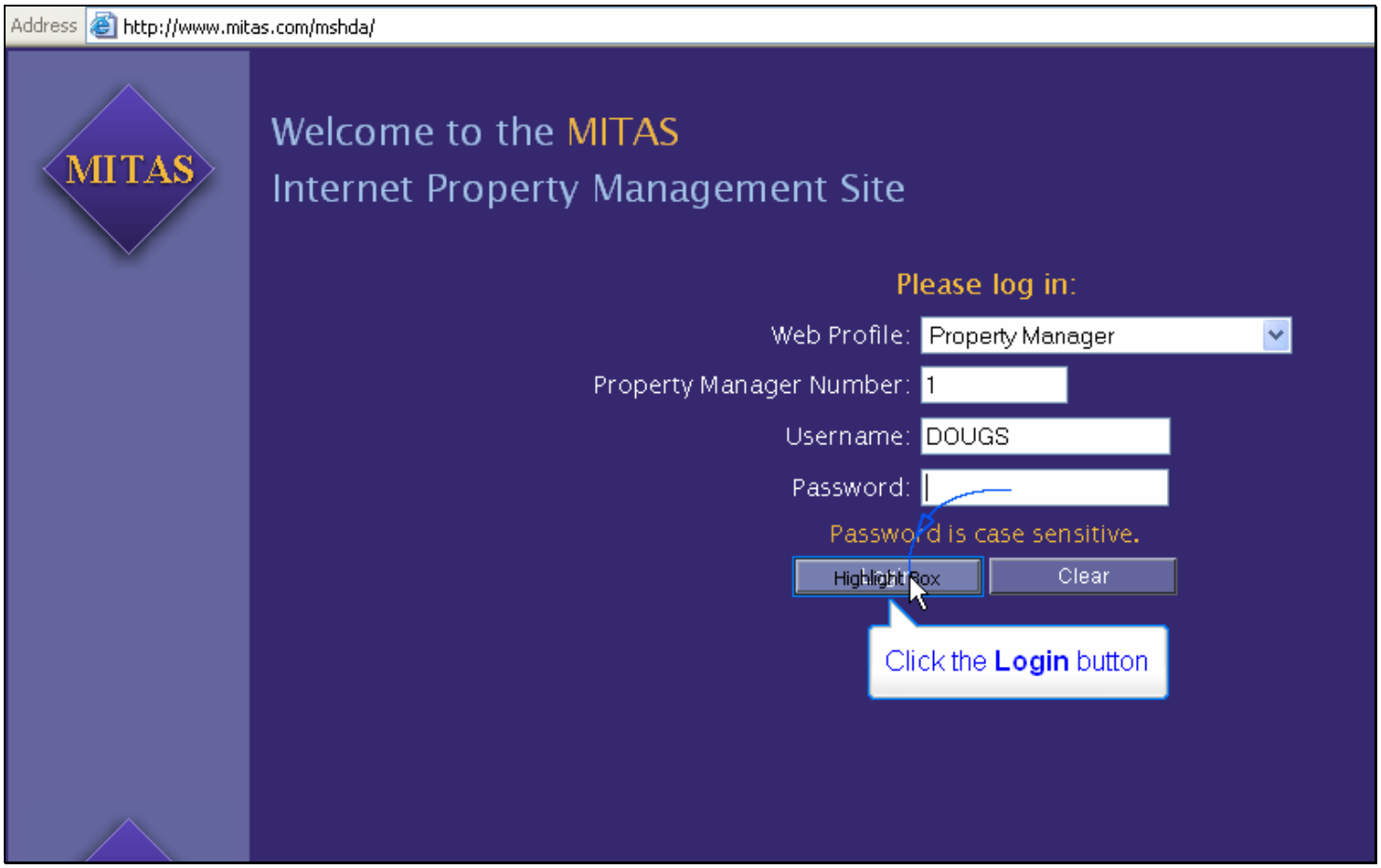


Text Captions

Select the **Password** text box, and input your password

Notes

Slide 15 - Slide 15

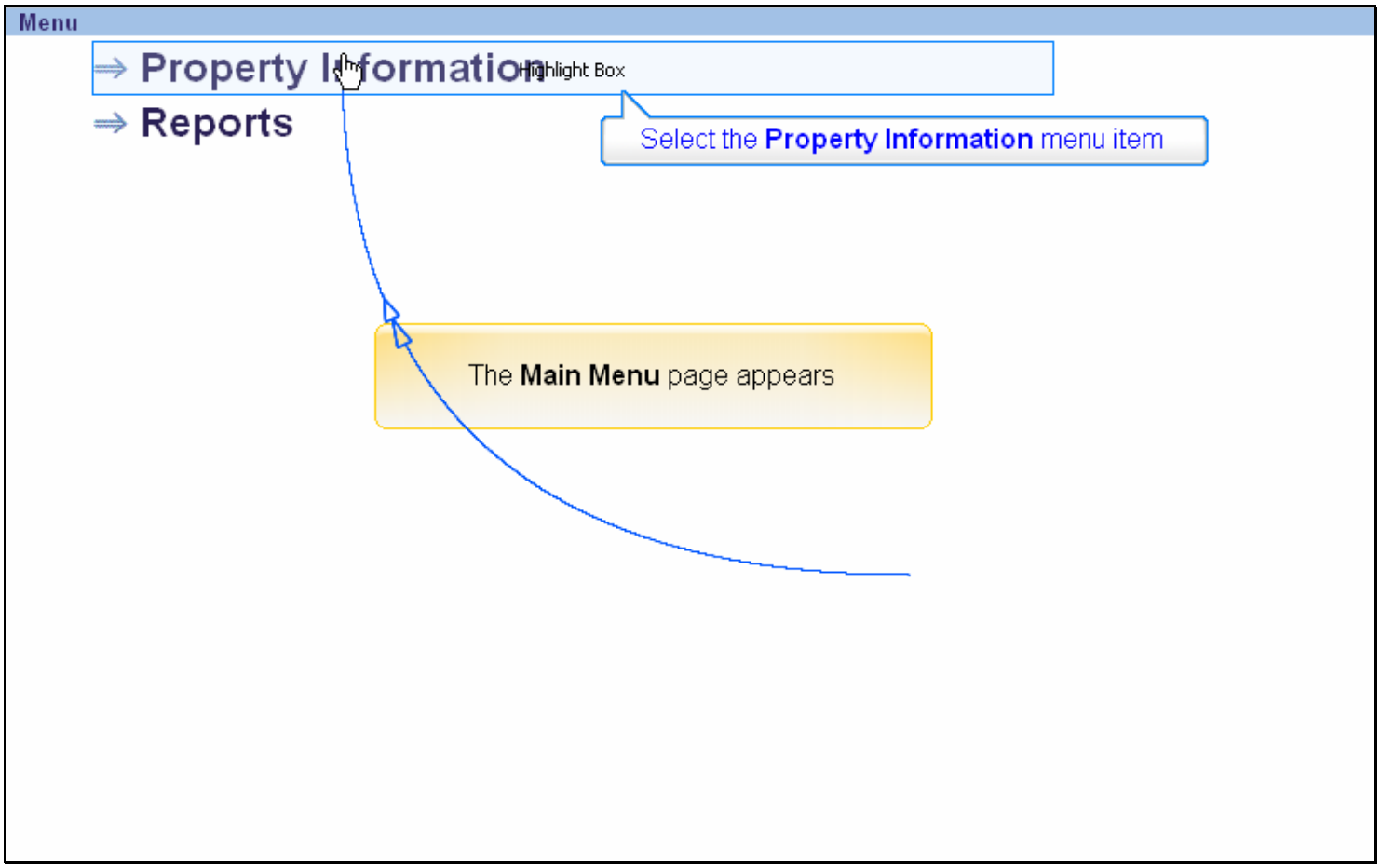


Text Captions

Click the **Login** button

Notes

Slide 17 - Slide 17



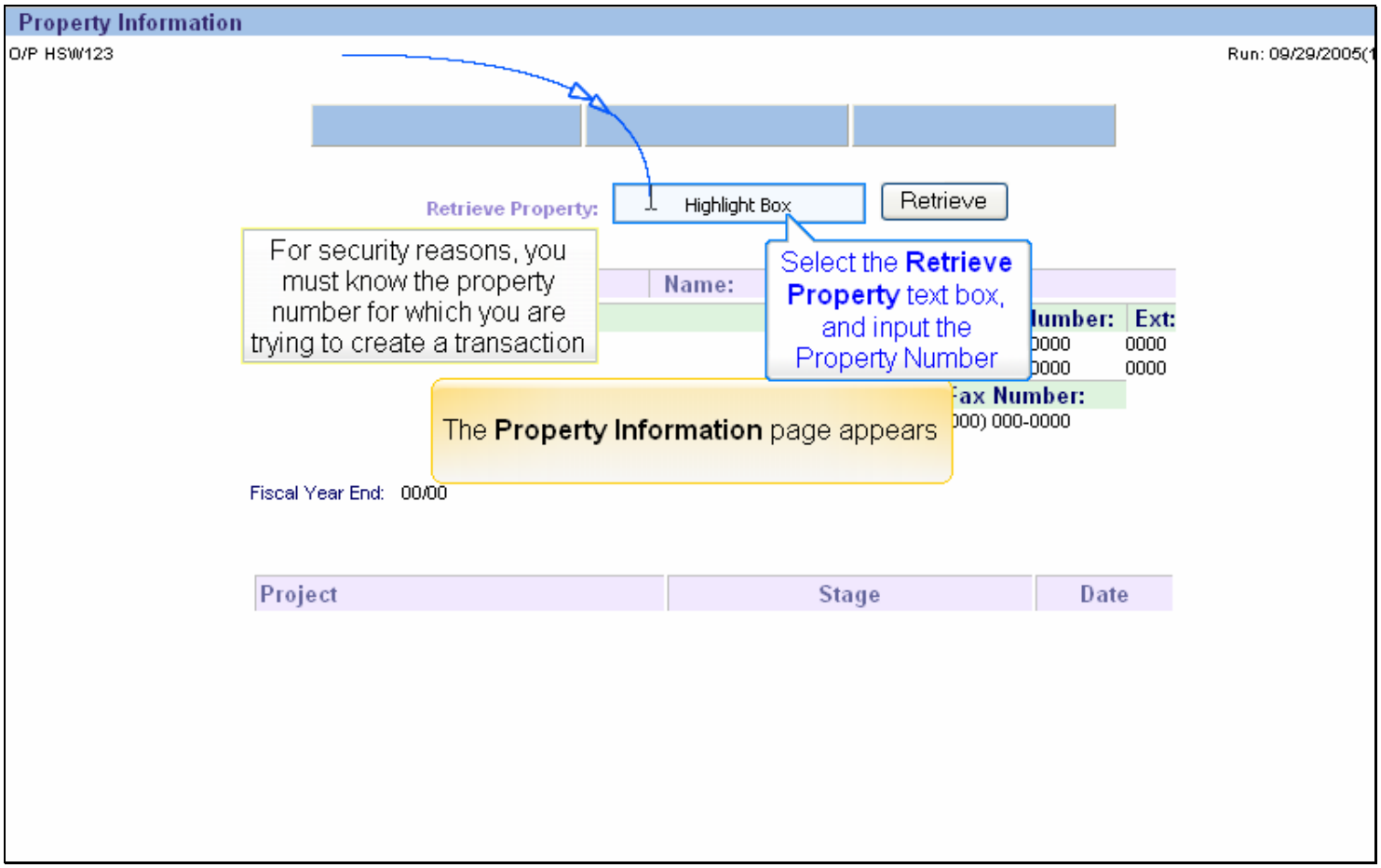
Text Captions

The **Main Menu** page appears

Select the **Property Information** menu item

Notes

Slide 19 - Slide 19



Text Captions

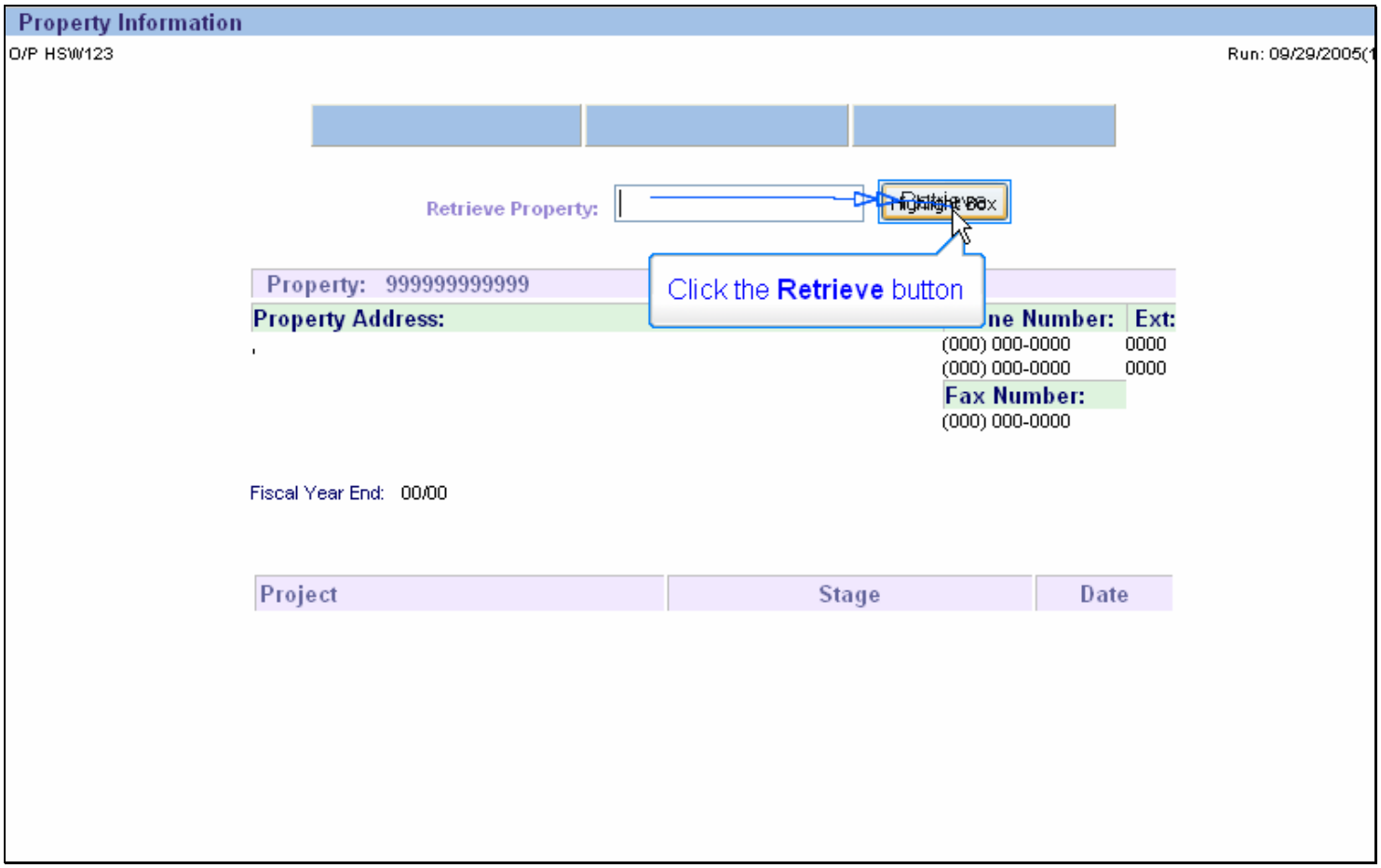
The **Property Information** page appears

For security reasons, you must know the property number for which you are trying to create a transaction

Select the **Retrieve Property** text box, and input the Property Number

Notes

Slide 20 - Slide 20

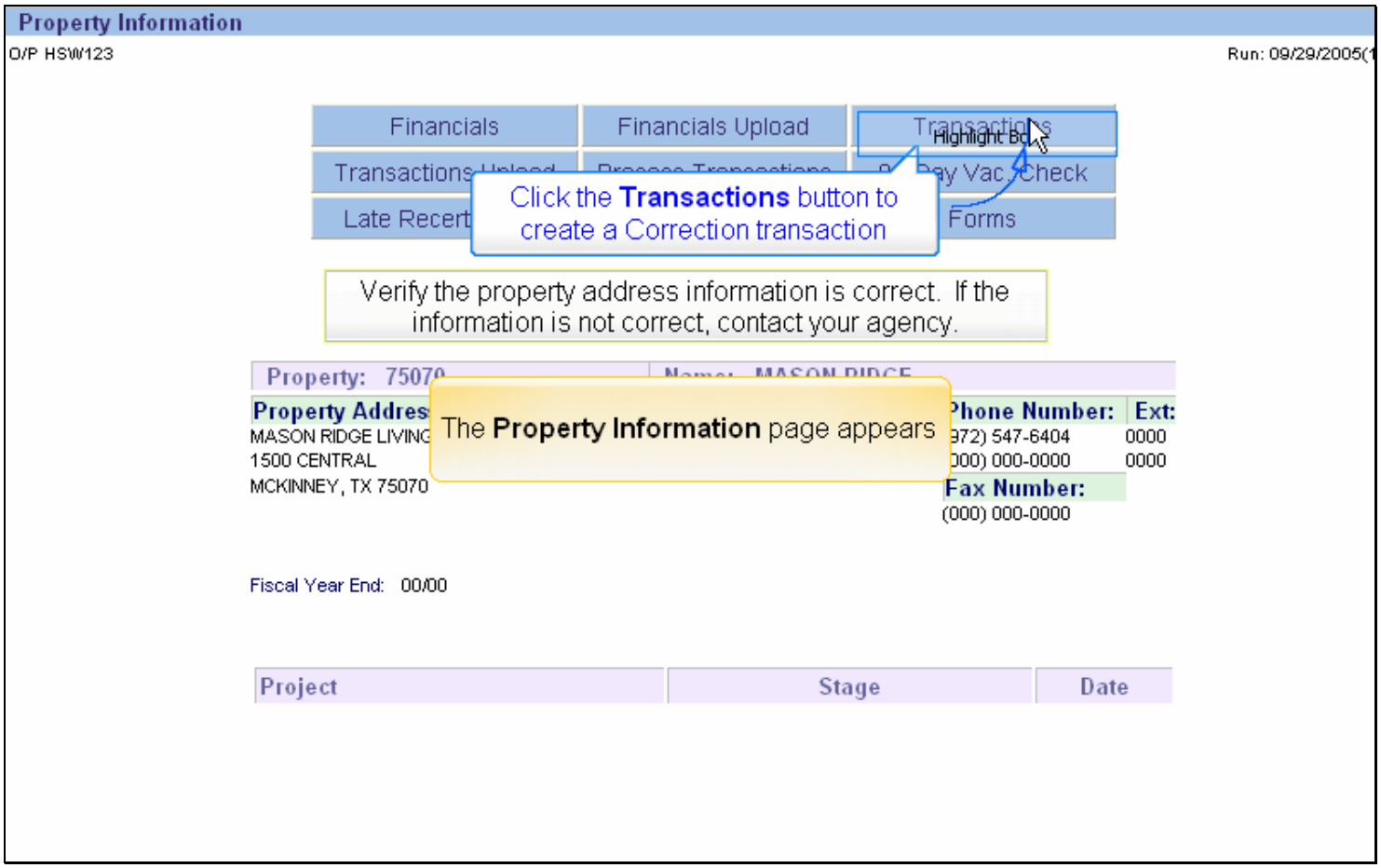


Text Captions

Click the **Retrieve** button

Notes

Slide 22 - Slide 22



Text Captions

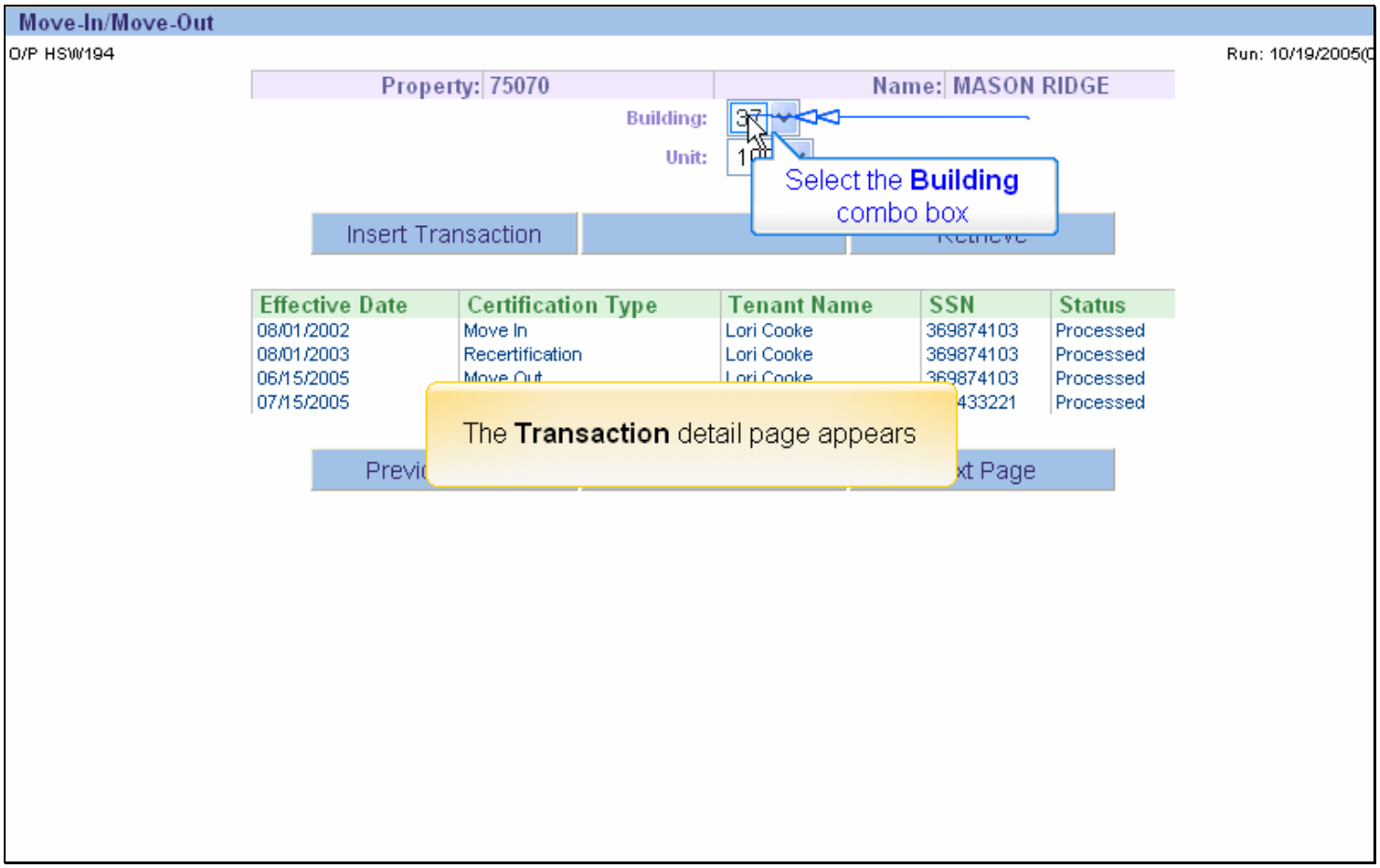
The **Property Information** page appears

Verify the property address information is correct. If the information is not correct, contact your agency.

Click the **Transactions** button to create a Correction transaction

Notes

Slide 24 - Slide 24



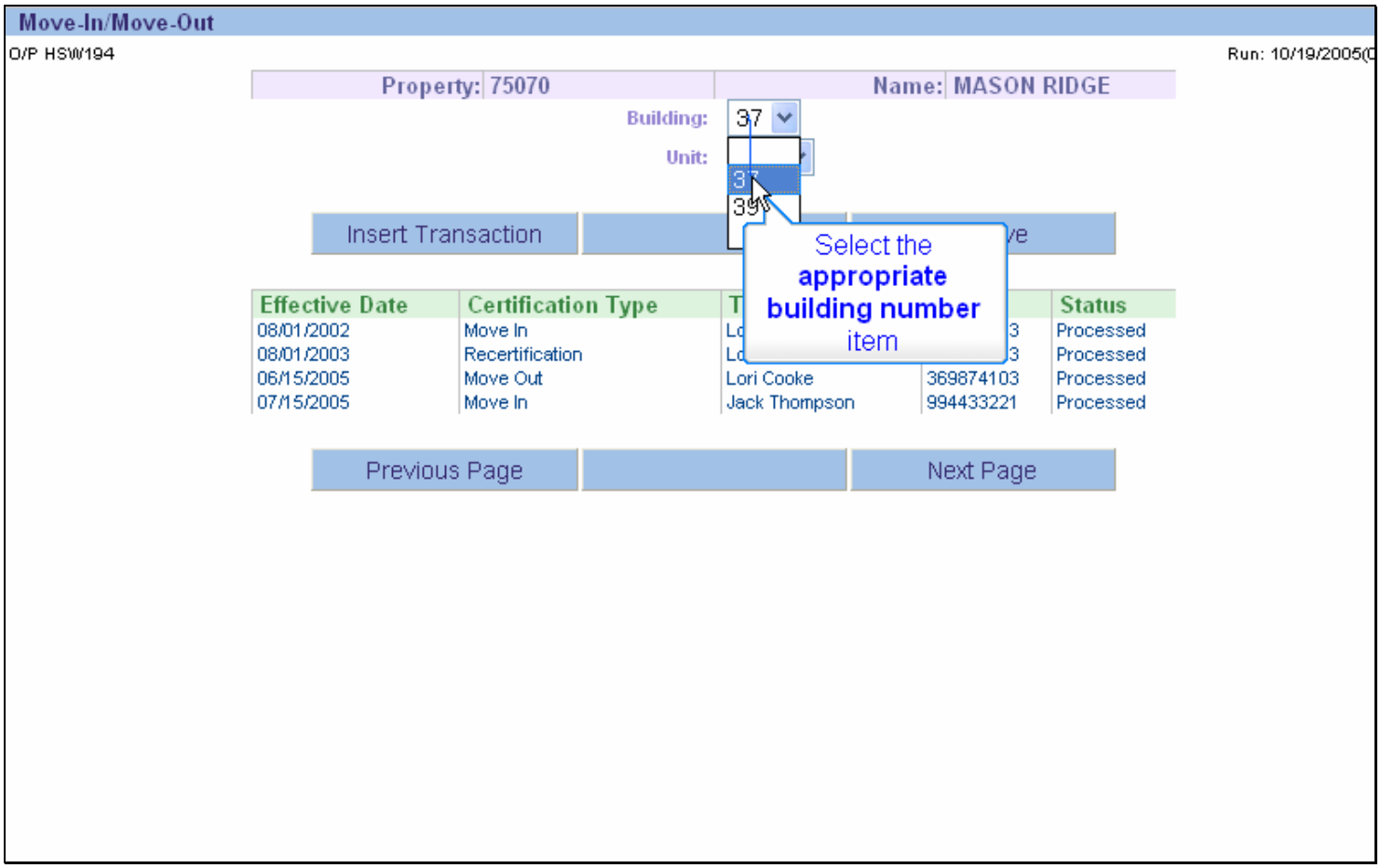
Text Captions

The **Transaction** detail page appears

Select the **Building** combo box

Notes

Slide 25 - Slide 25

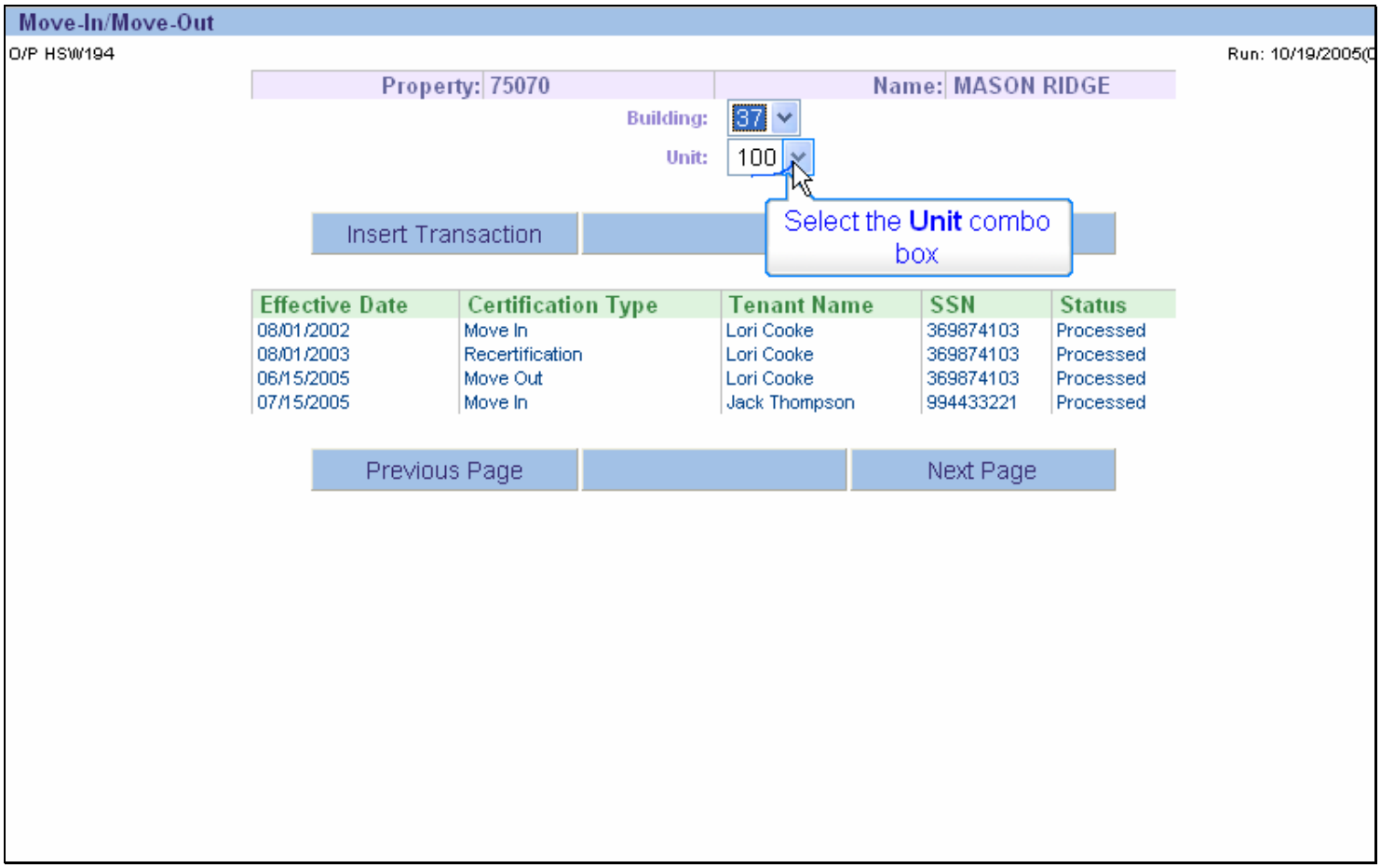


Text Captions

Select the **appropriate building number** item

Notes

Slide 26 - Slide 26

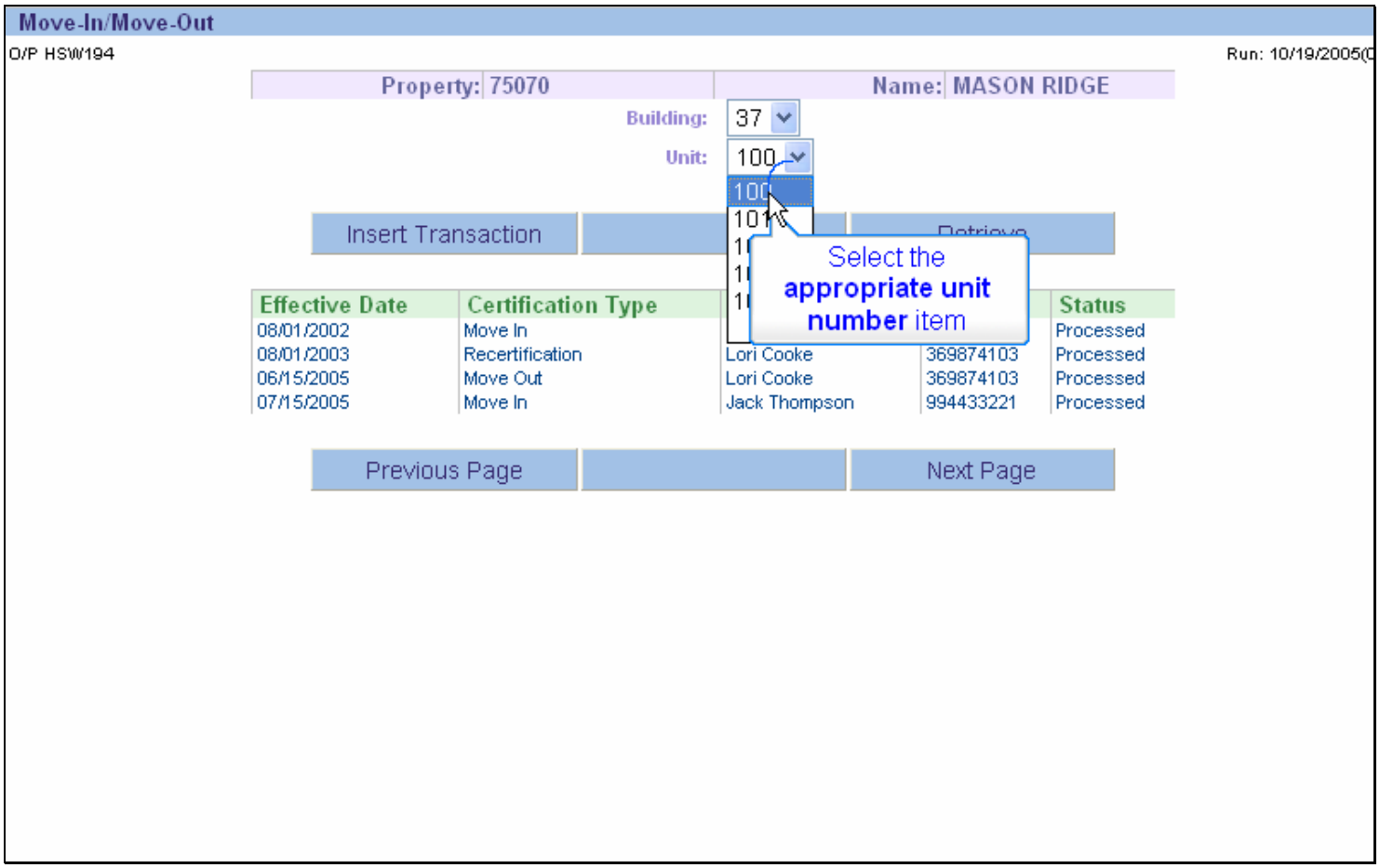


Text Captions

Select the **Unit** combo box

Notes

Slide 27 - Slide 27

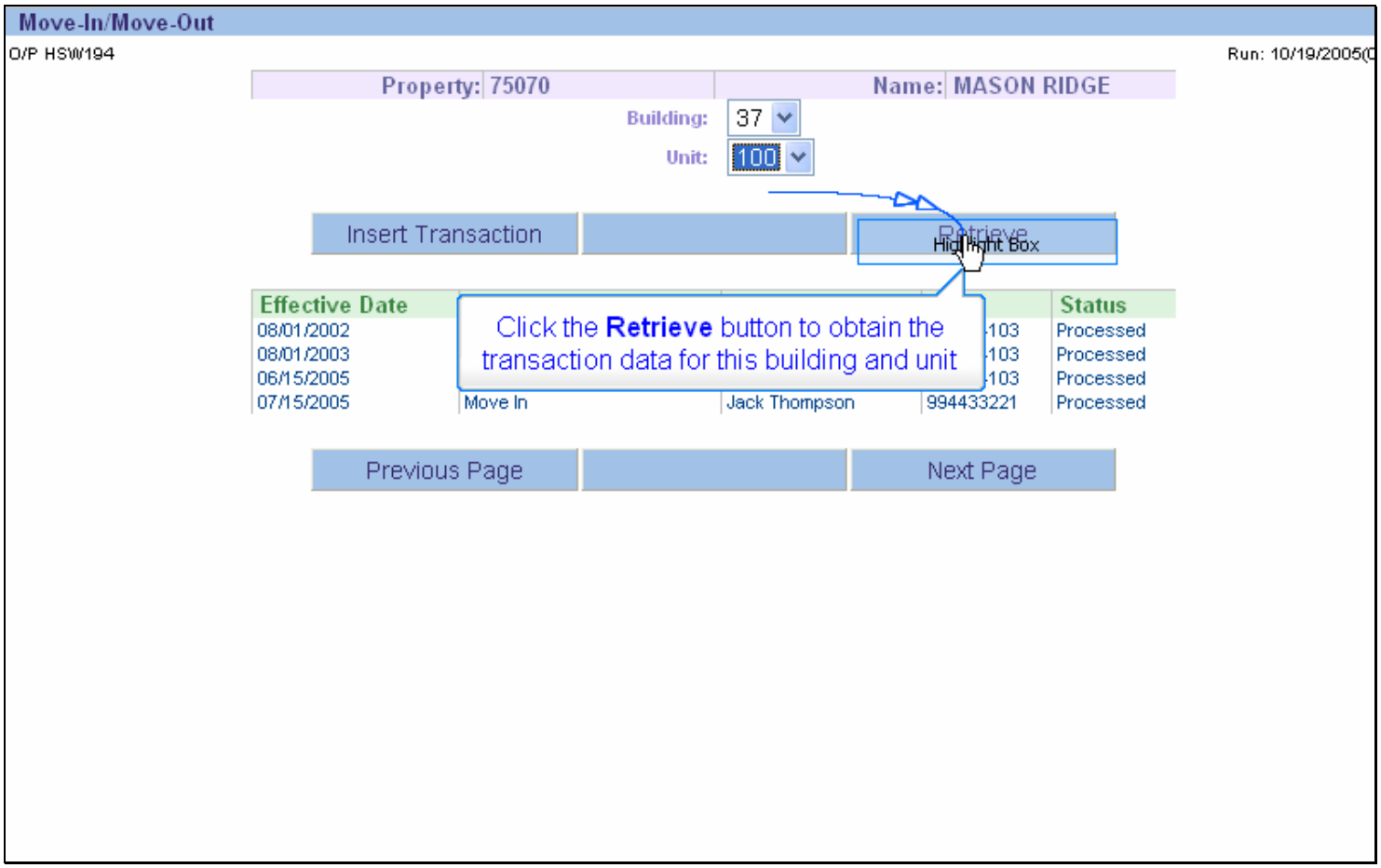


Text Captions

Select the **appropriate unit number** item

Notes

Slide 28 - Slide 28

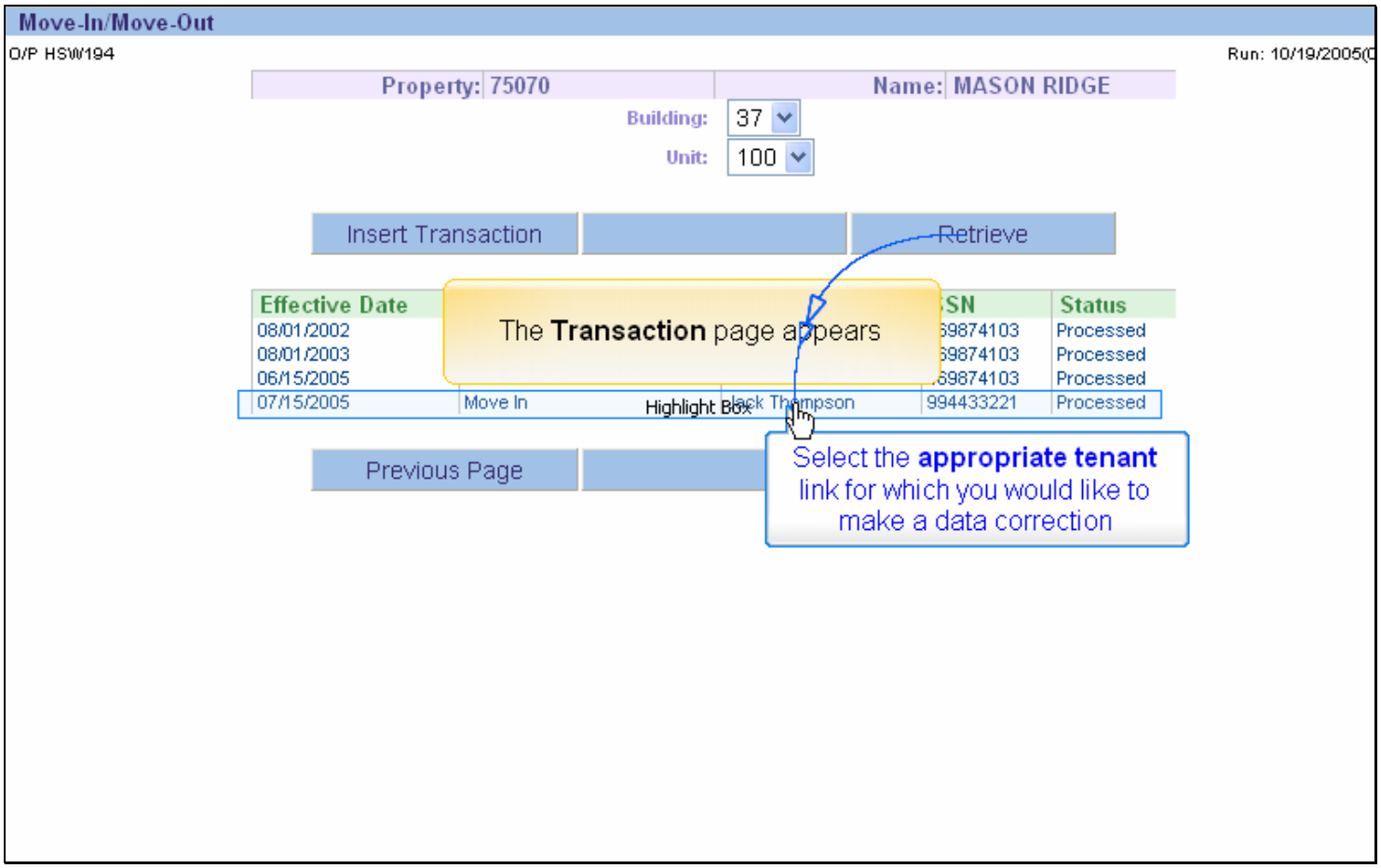


Text Captions

Click the **Retrieve** button to obtain the transaction data for this building and unit

Notes

Slide 30 - Slide 30



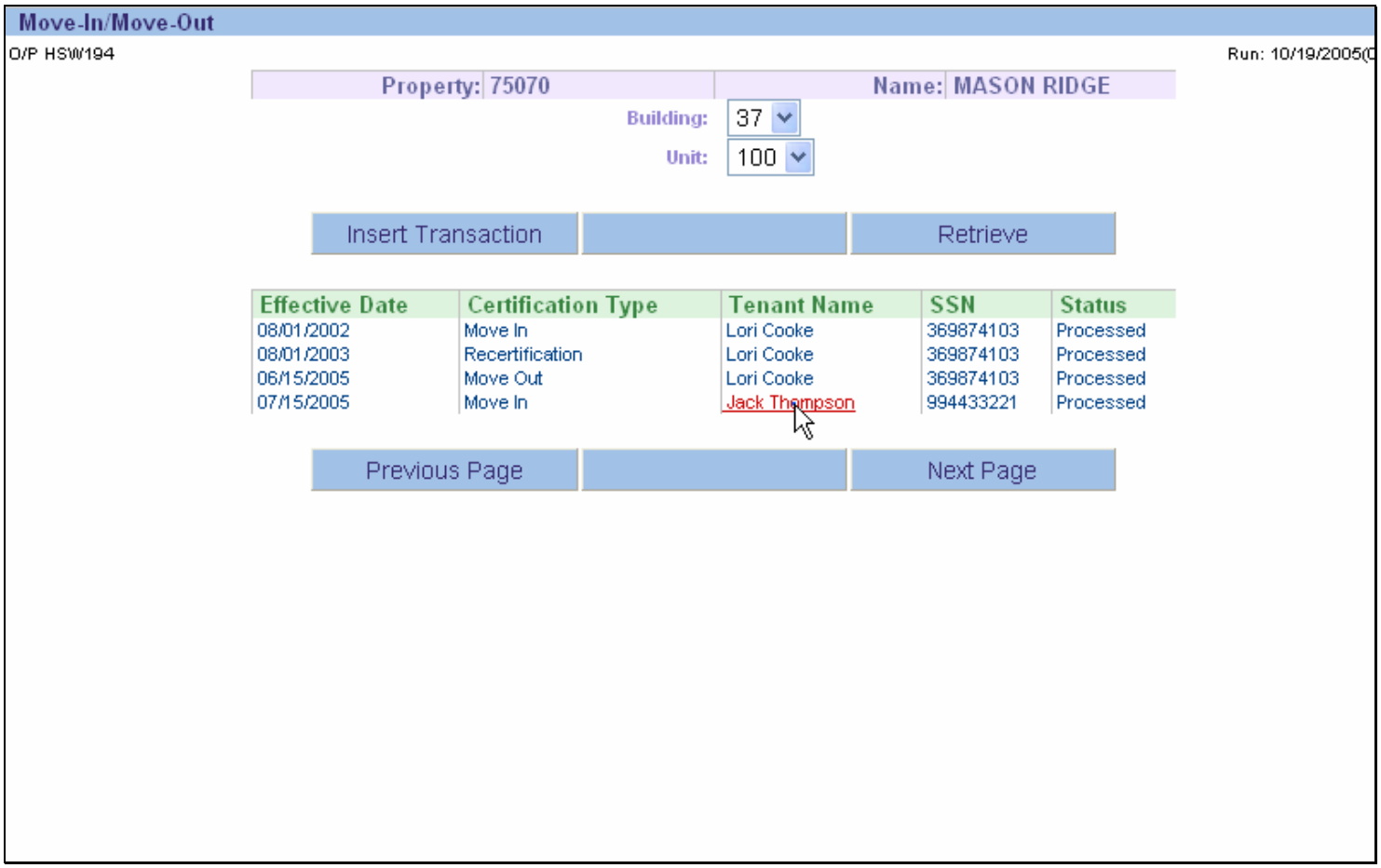
Text Captions

The **Transaction** page appears

Select the **appropriate tenant** link for which you would like to make a data correction

Notes

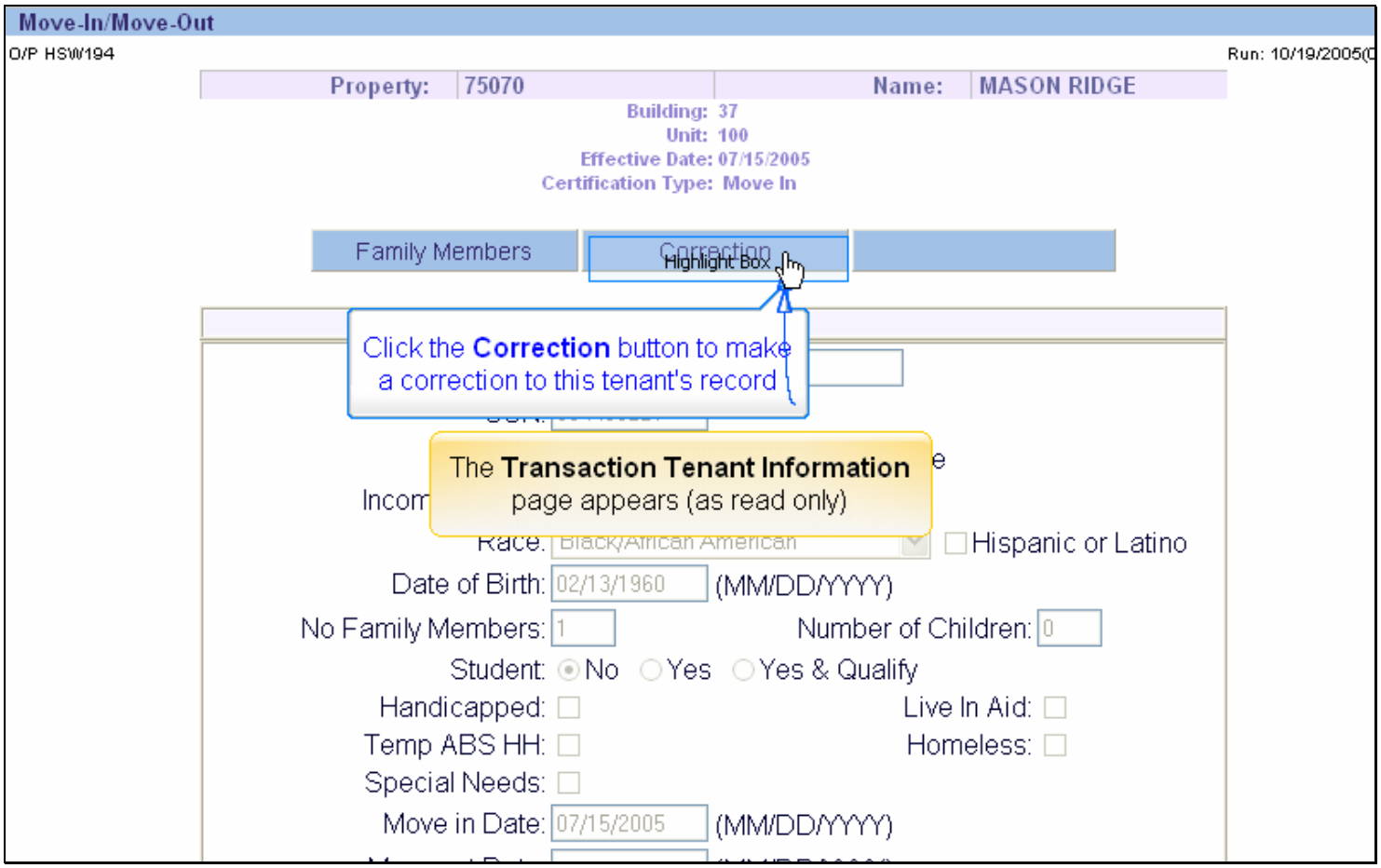
Slide 31 - Slide 31



Text Captions

Notes

Slide 32 - Slide 32



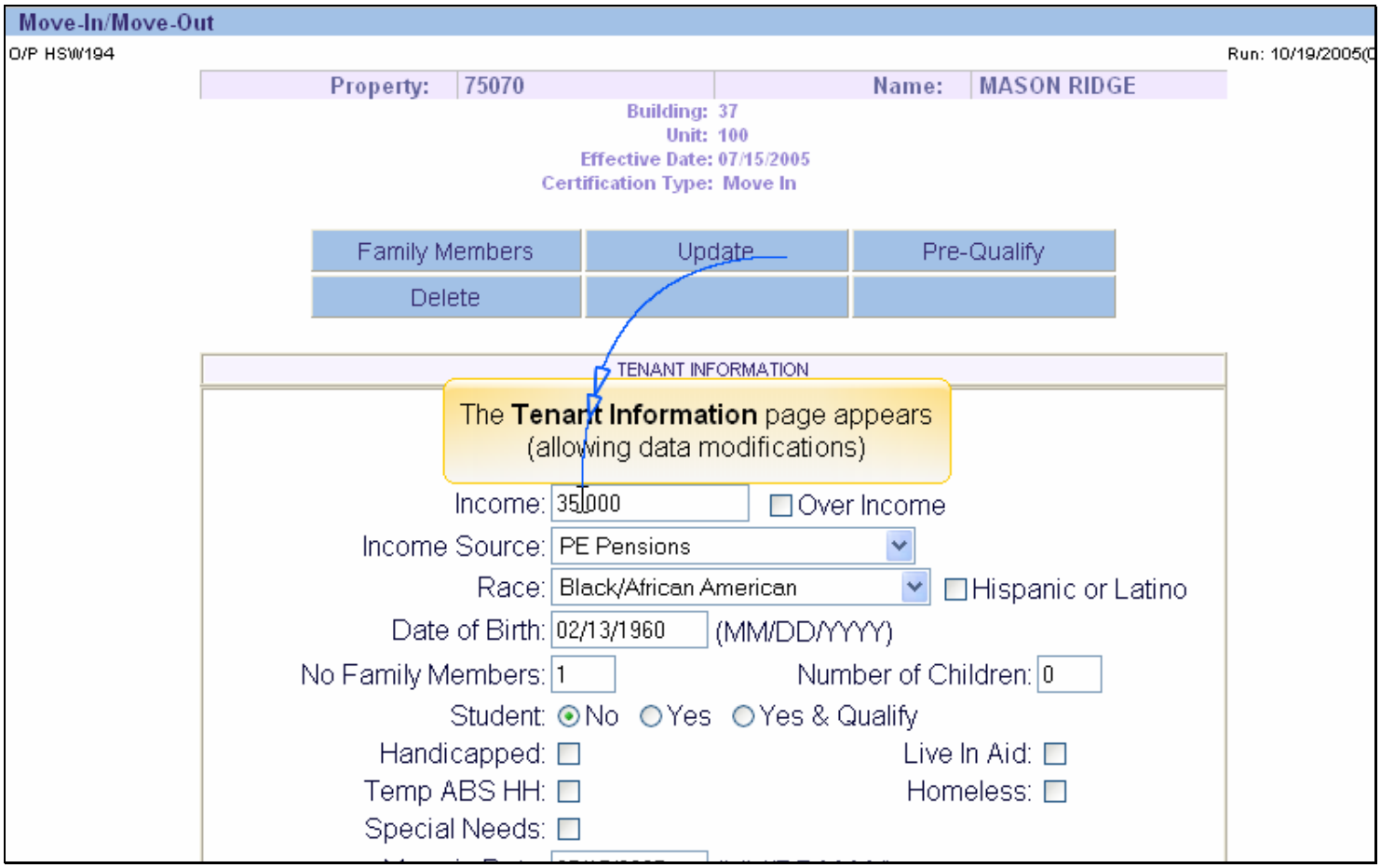
Text Captions

The **Transaction Tenant Information** page appears (as read only)

Click the **Correction** button to make a correction to this tenant's record

Notes

Slide 34 - Slide 34

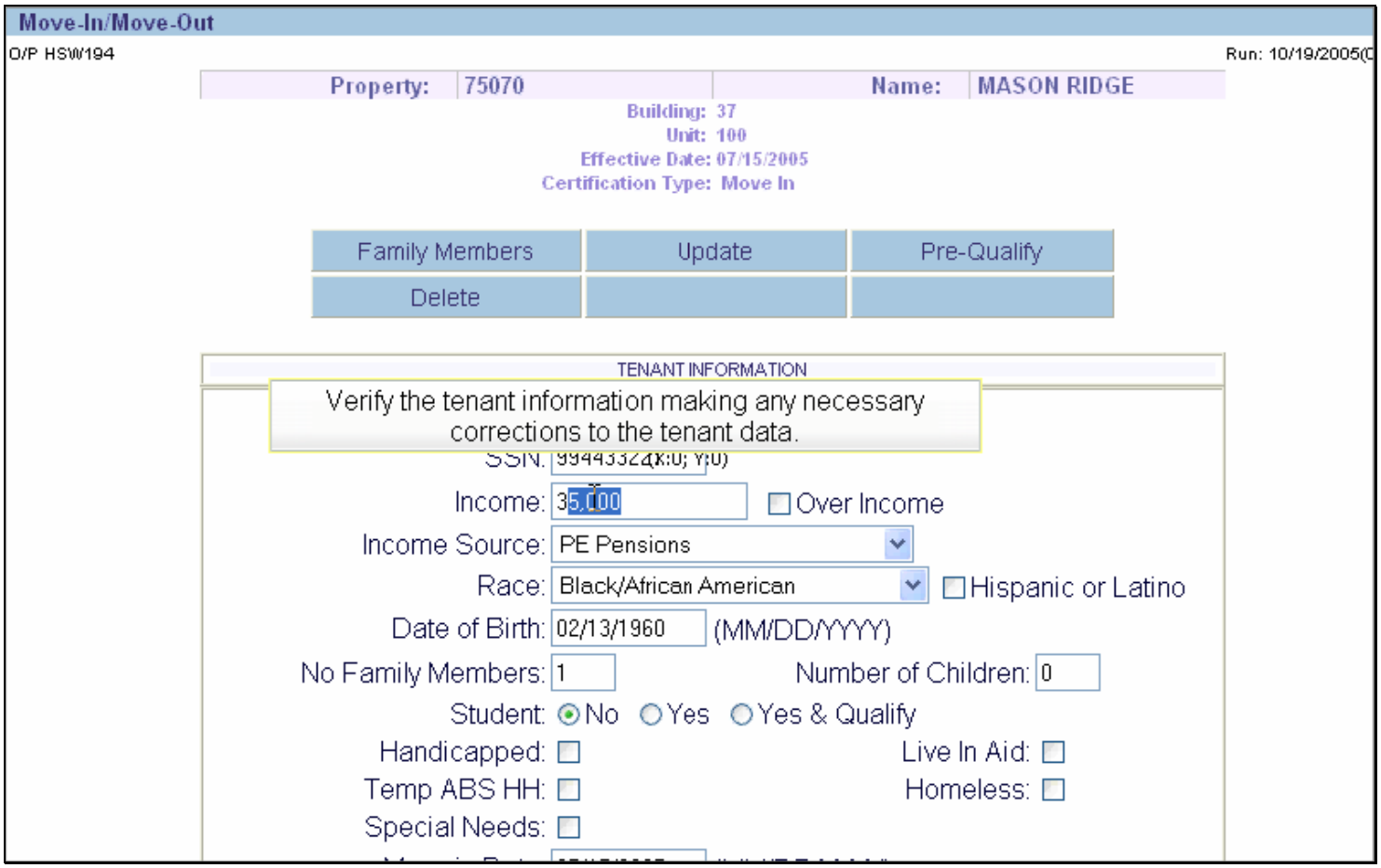


Text Captions

The **Tenant Information** page appears (allowing data modifications)

Notes

Slide 35 - Slide 35

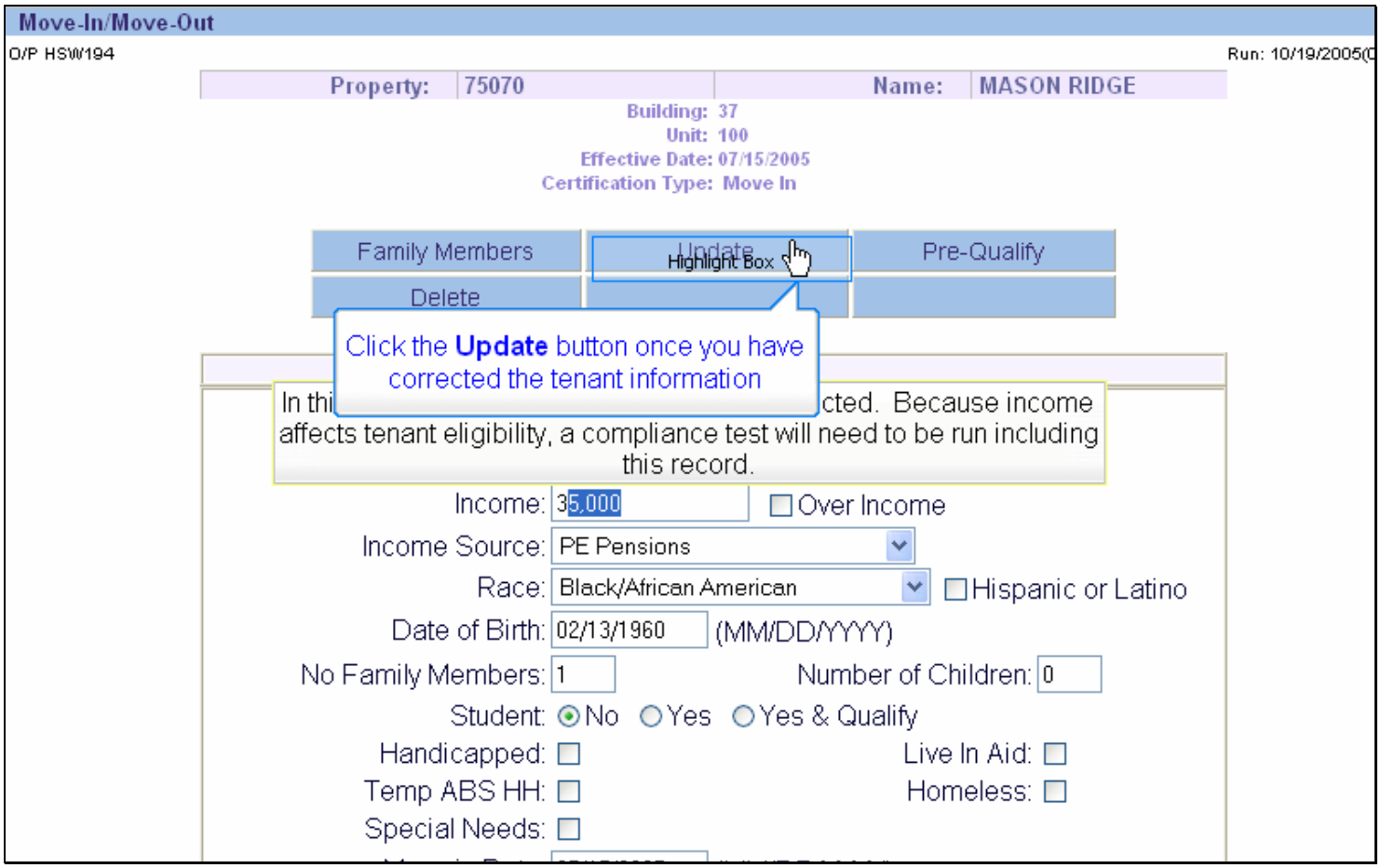


Text Captions

Verify the tenant information making any necessary corrections to the tenant data.

Notes

Slide 36 - Slide 36



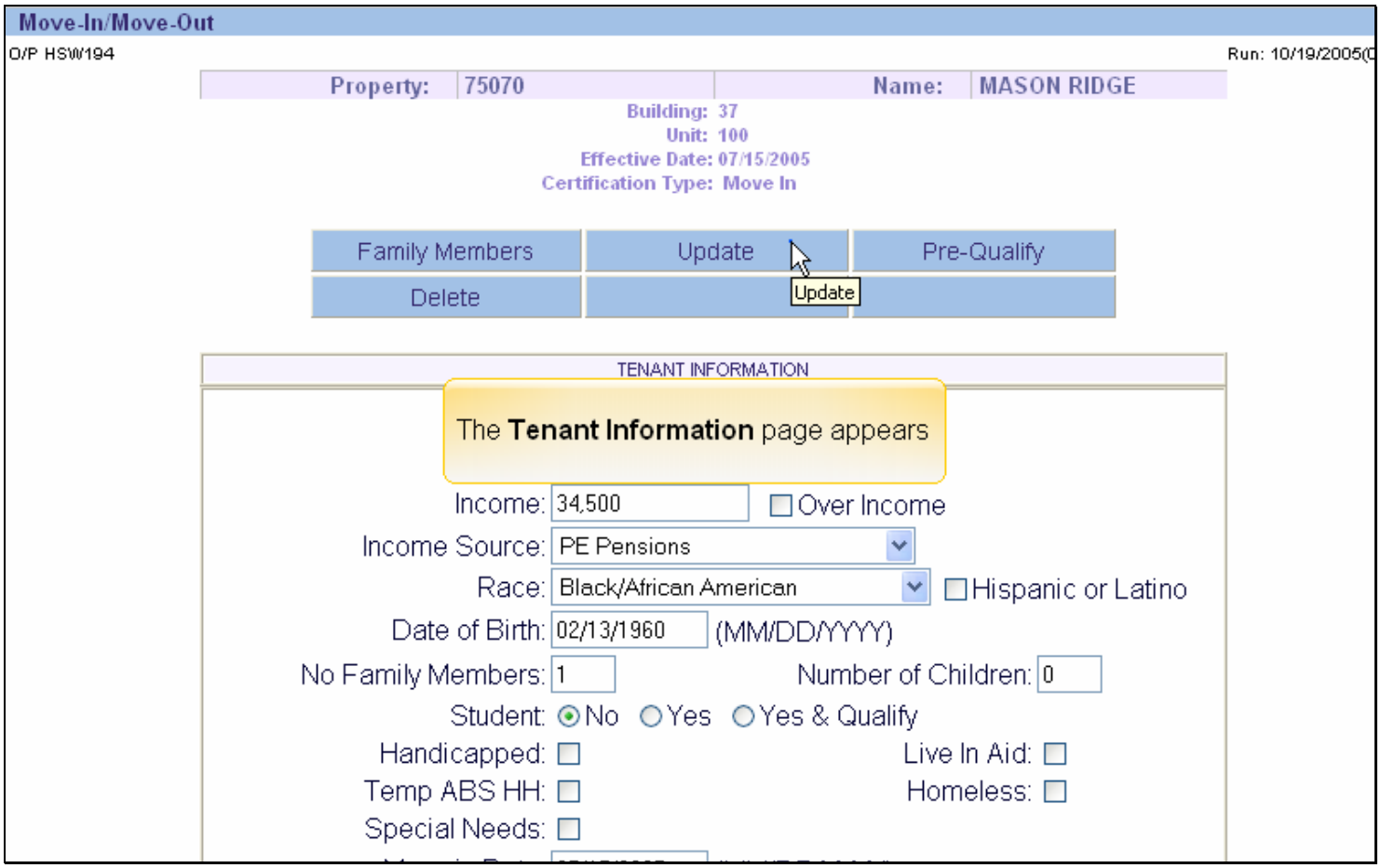
Text Captions

In this simulation, the tenant income was corrected. Because income affects tenant eligibility, a compliance test will need to be run including this record.

Click the **Update** button once you have corrected the tenant information

Notes

Slide 38 - Slide 38

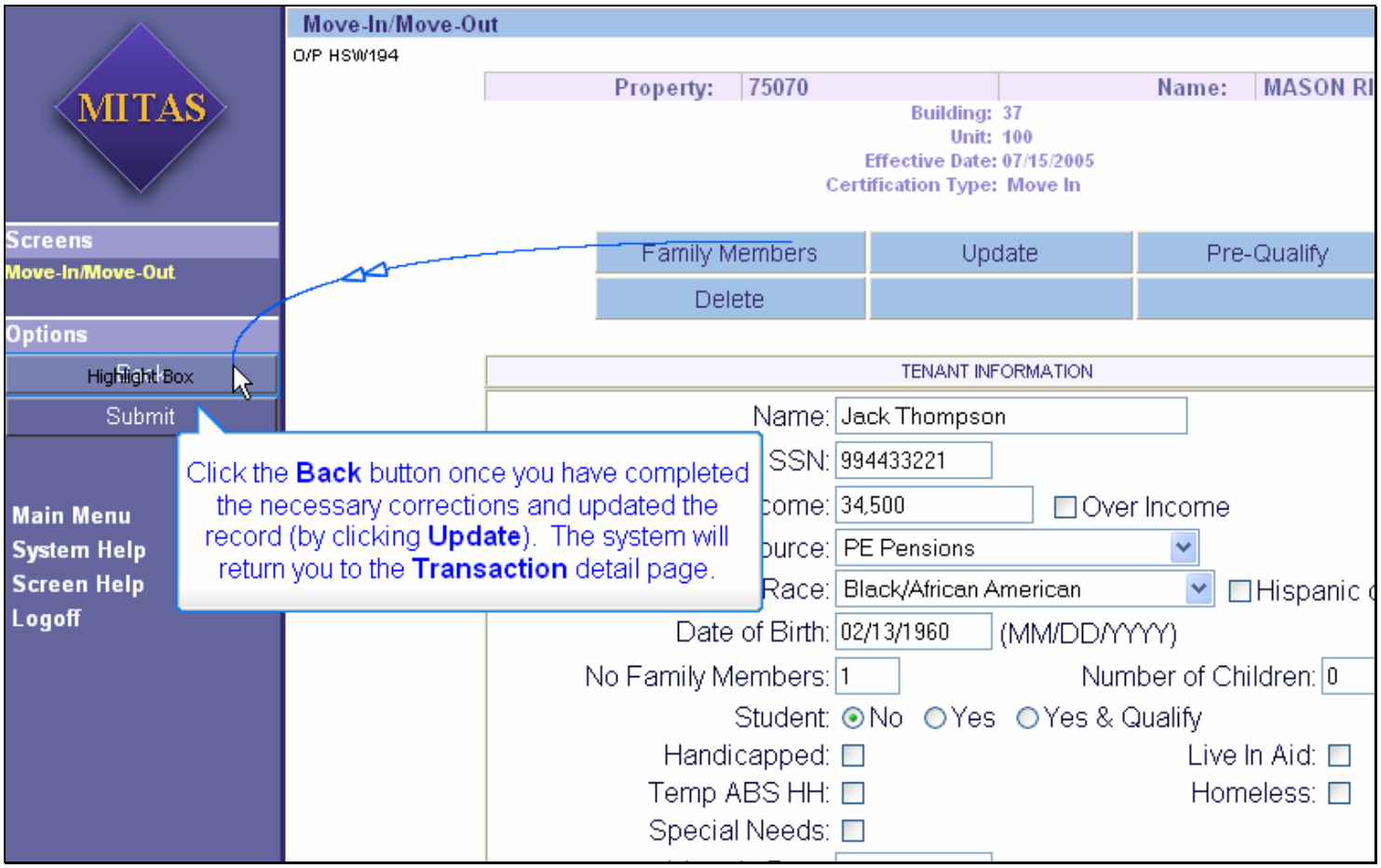


Text Captions

The **Tenant Information** page appears

Notes

Slide 39 - Slide 39

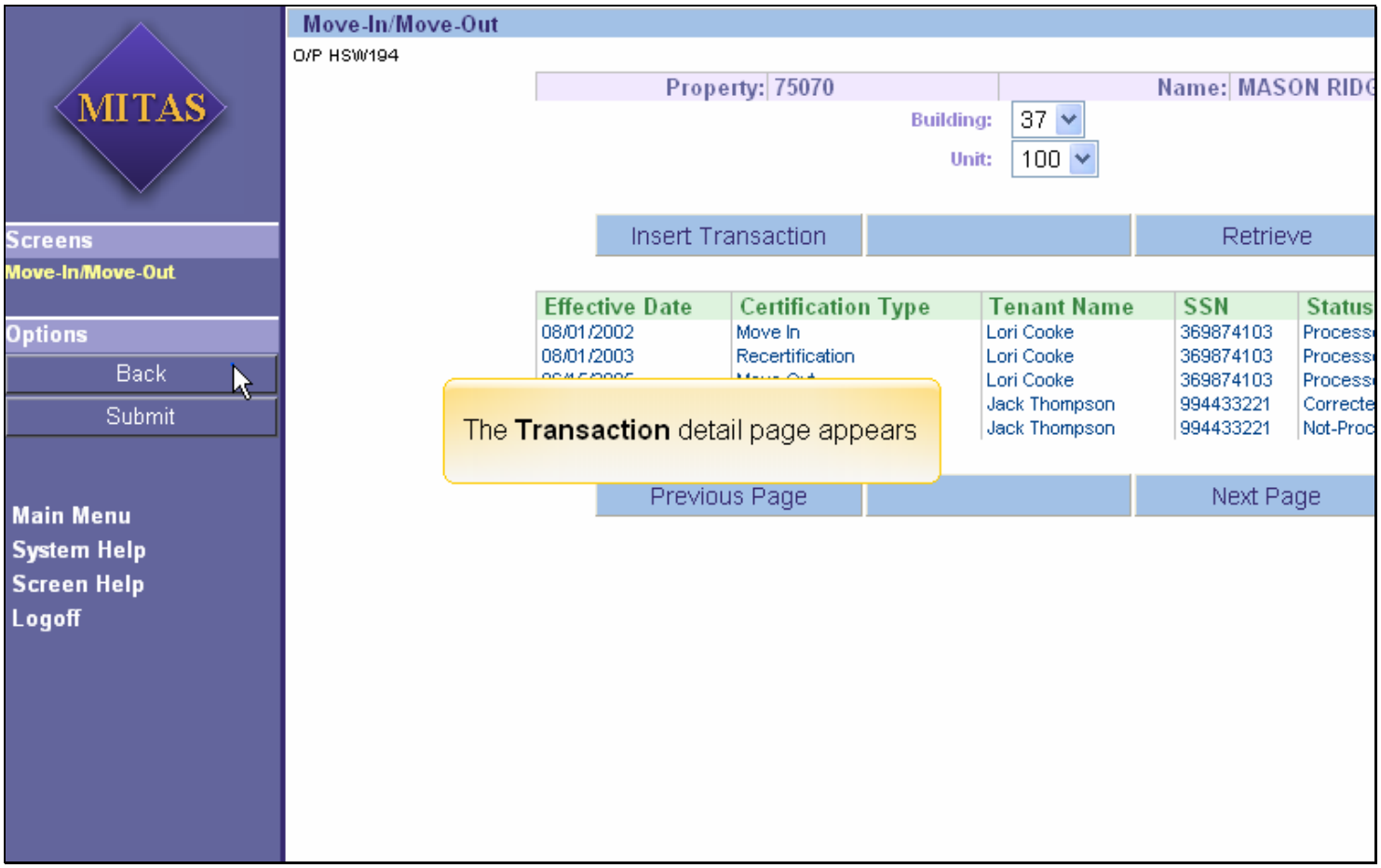


Text Captions

Click the **Back** button once you have completed the necessary corrections and updated the record (by clicking **Update**). The system will return you to the **Transaction** detail page.

Notes

Slide 41 - Slide 41

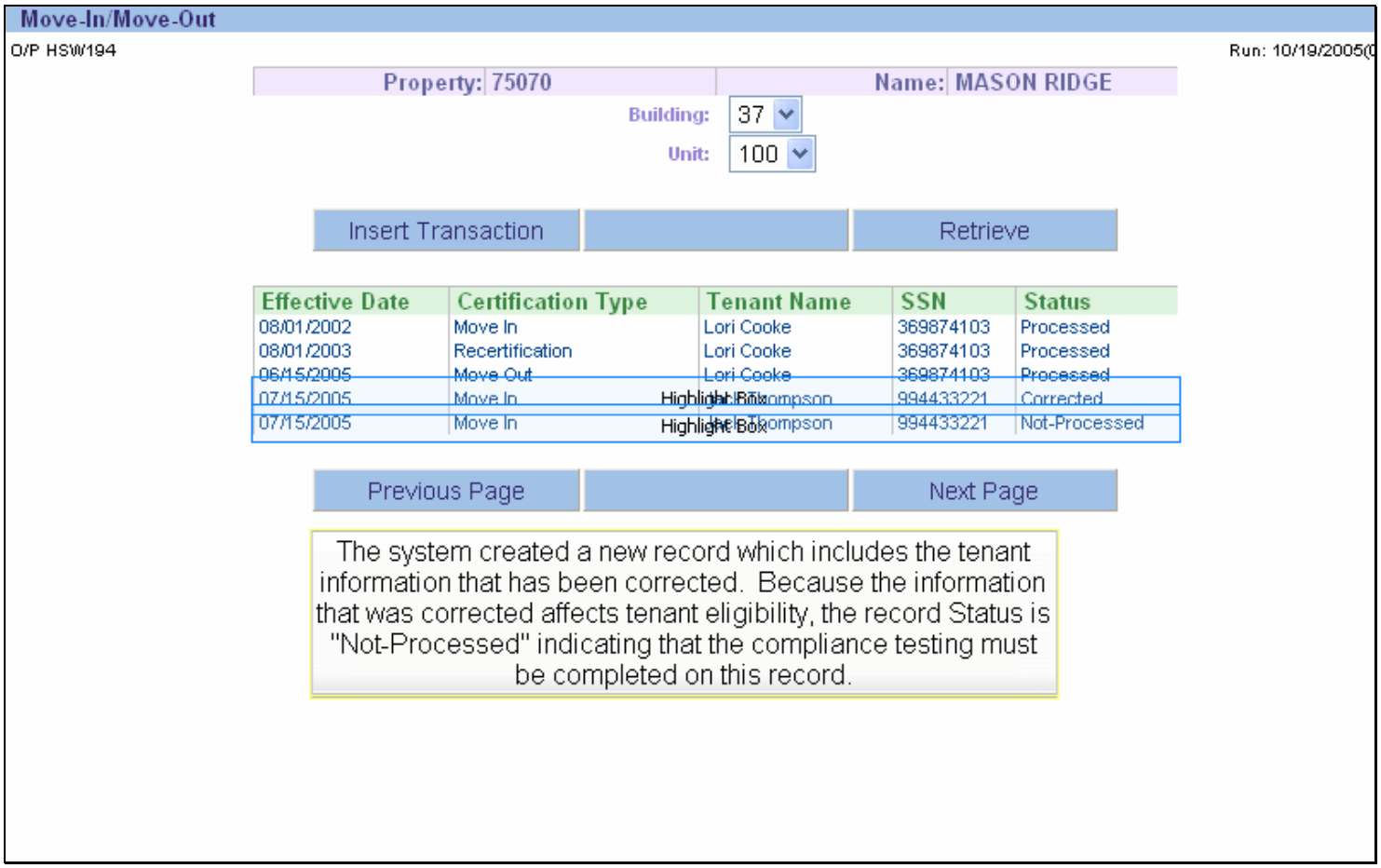


Text Captions

The **Transaction** detail page appears

Notes

Slide 42 - Slide 42



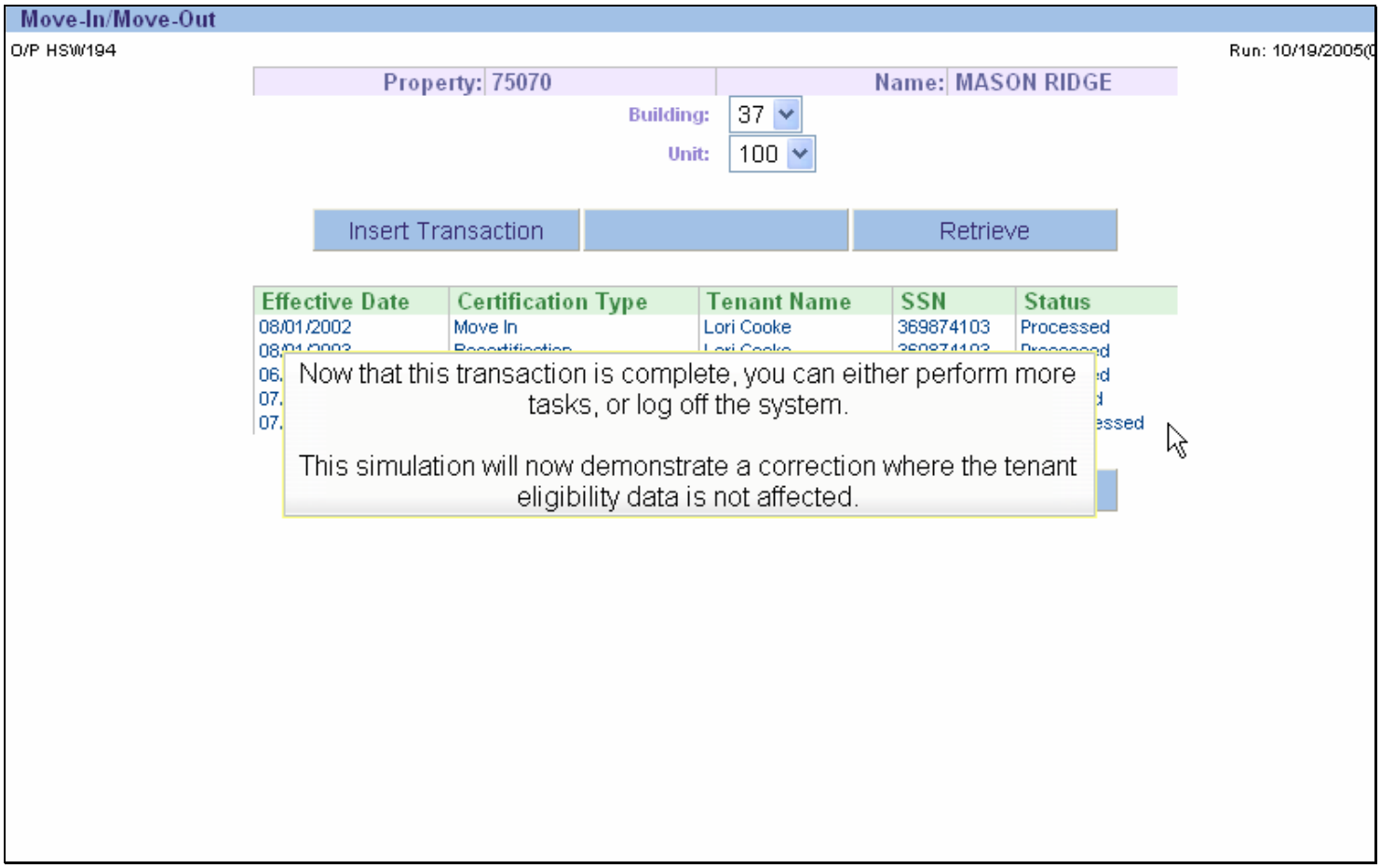
Text Captions

The original transaction remains, but the Status has been changed to "Corrected."

The system created a new record which includes the tenant information that has been corrected. Because the information that was corrected affects tenant eligibility, the record Status is "Not-Processed" indicating that the compliance testing must be completed on this record.

Notes

Slide 43 - Slide 43



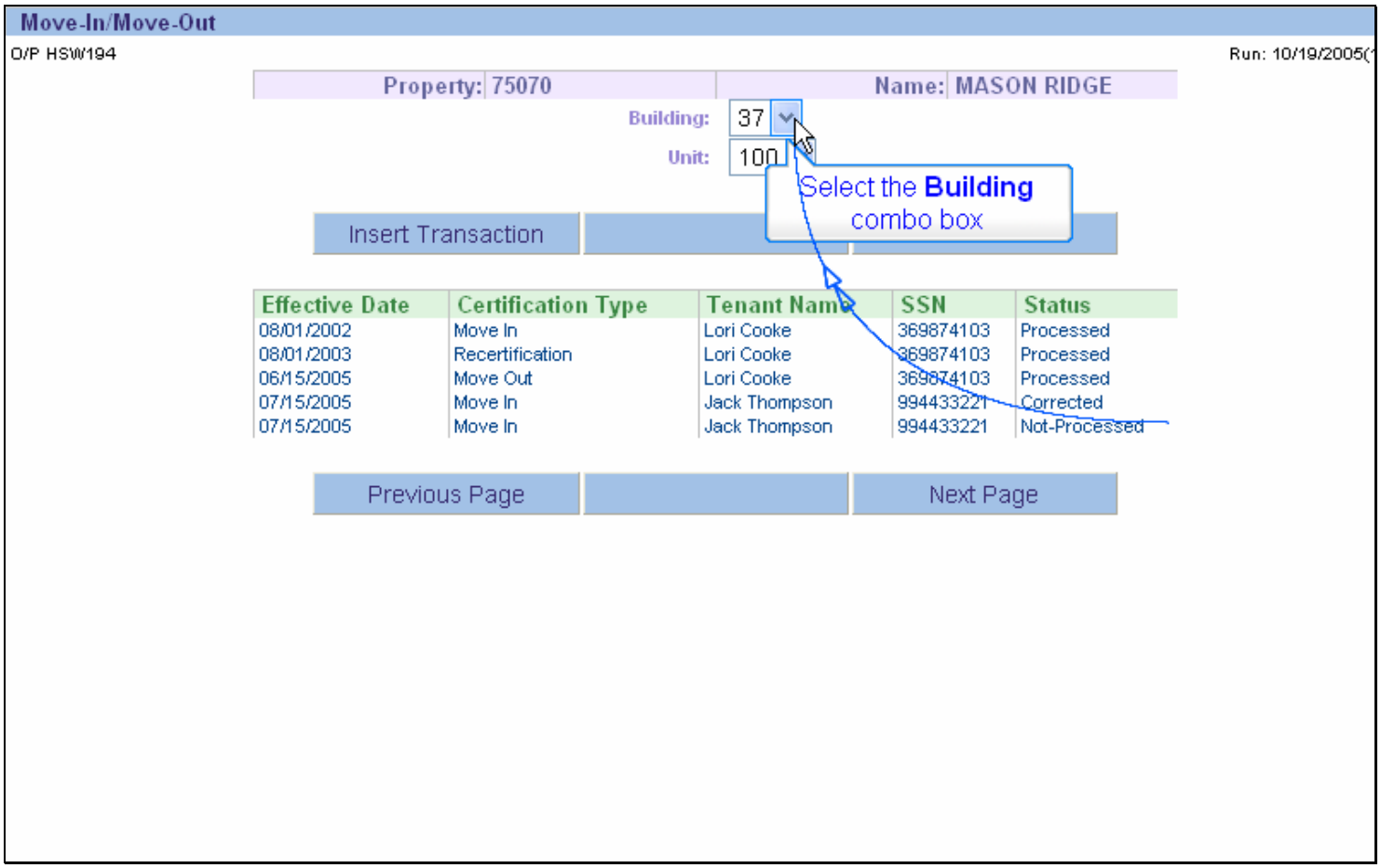
Text Captions

Now that this transaction is complete, you can either perform more tasks, or log off the system.

This simulation will now demonstrate a correction where the tenant eligibility data is not affected.

Notes

Slide 44 - Slide 44

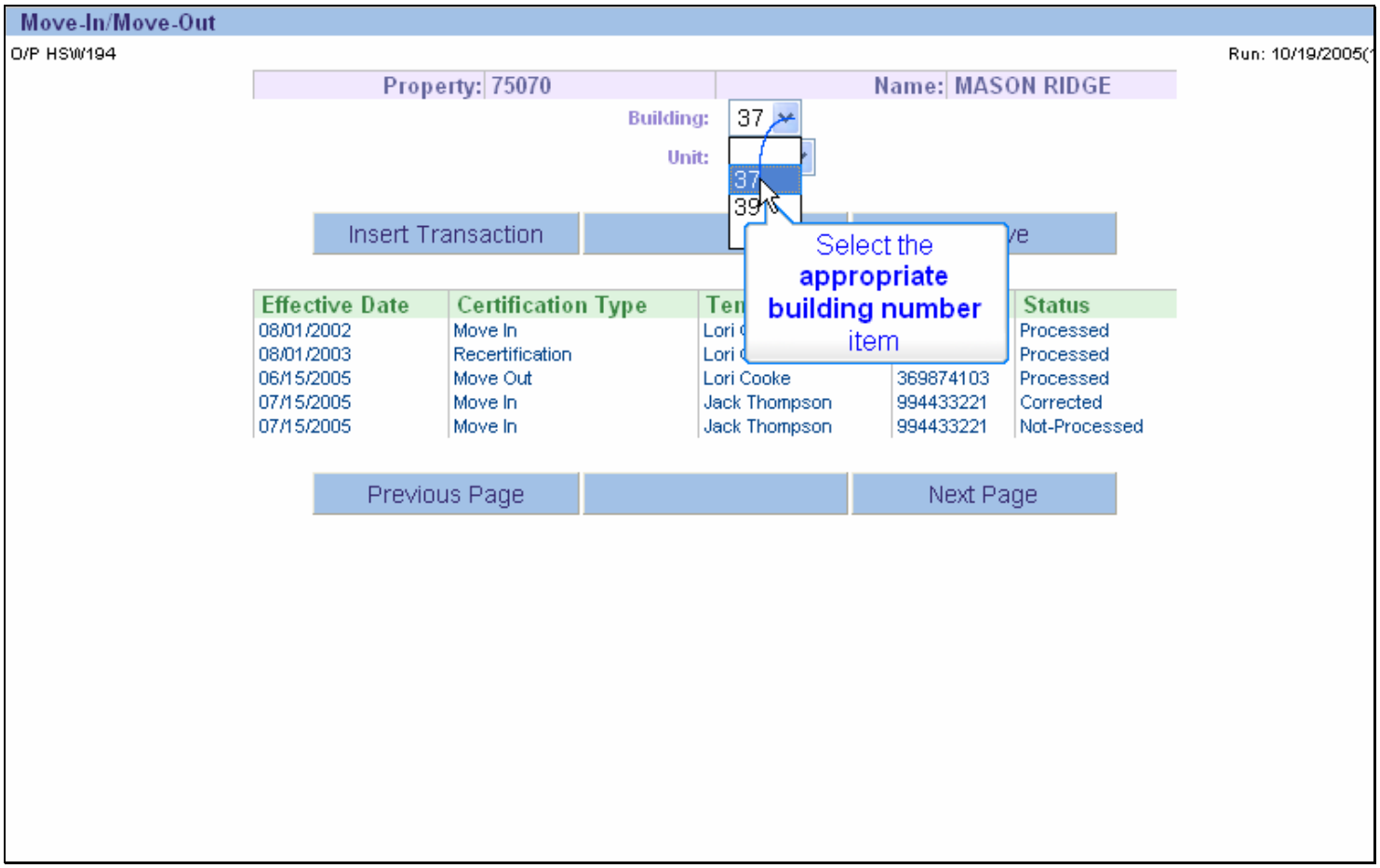


Text Captions

Select the **Building** combo box

Notes

Slide 45 - Slide 45

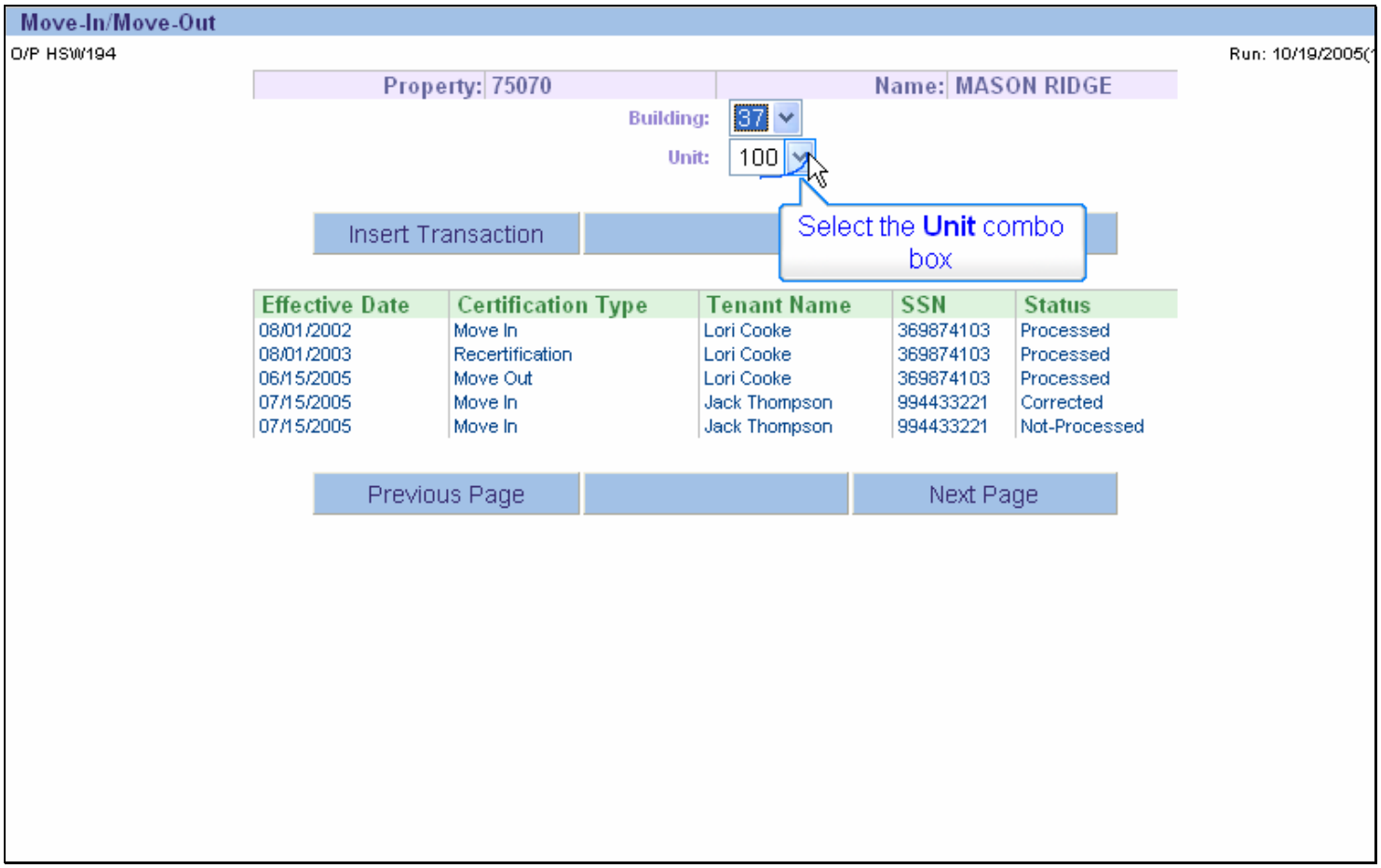


Text Captions

Select the **appropriate building number** item

Notes

Slide 46 - Slide 46

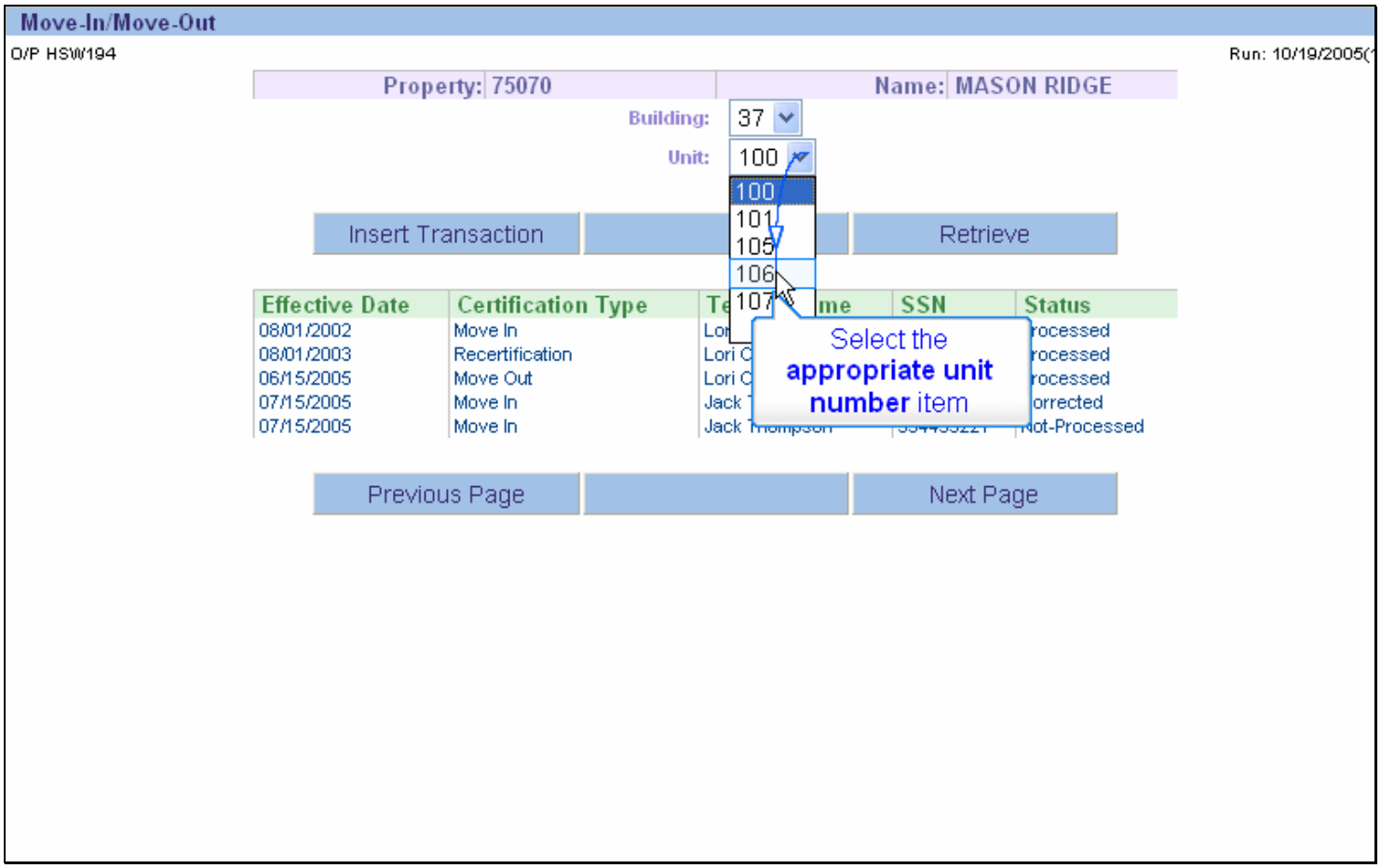


Text Captions

Select the **Unit** combo box

Notes

Slide 47 - Slide 47

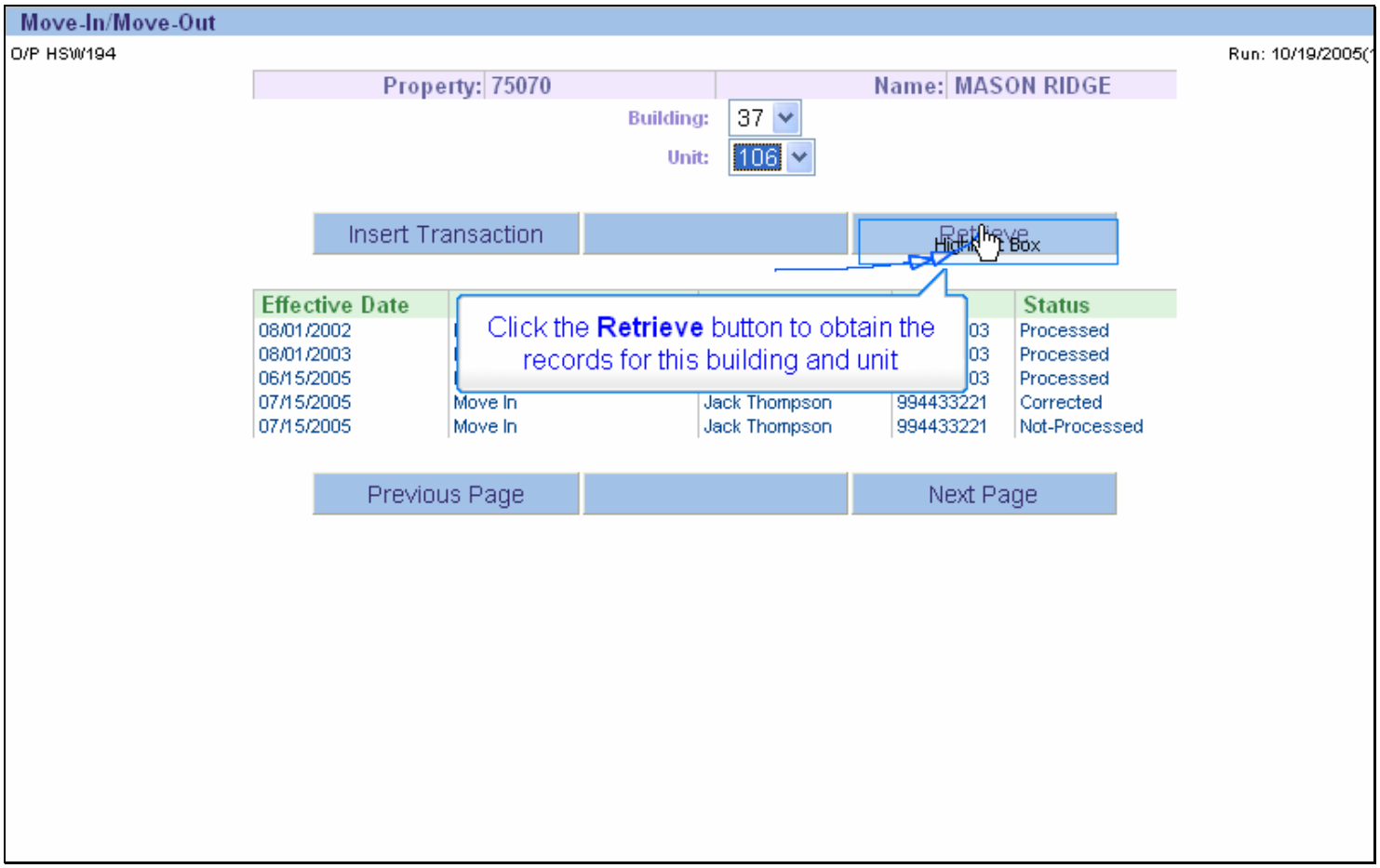


Text Captions

Select the **appropriate unit number** item

Notes

Slide 48 - Slide 48

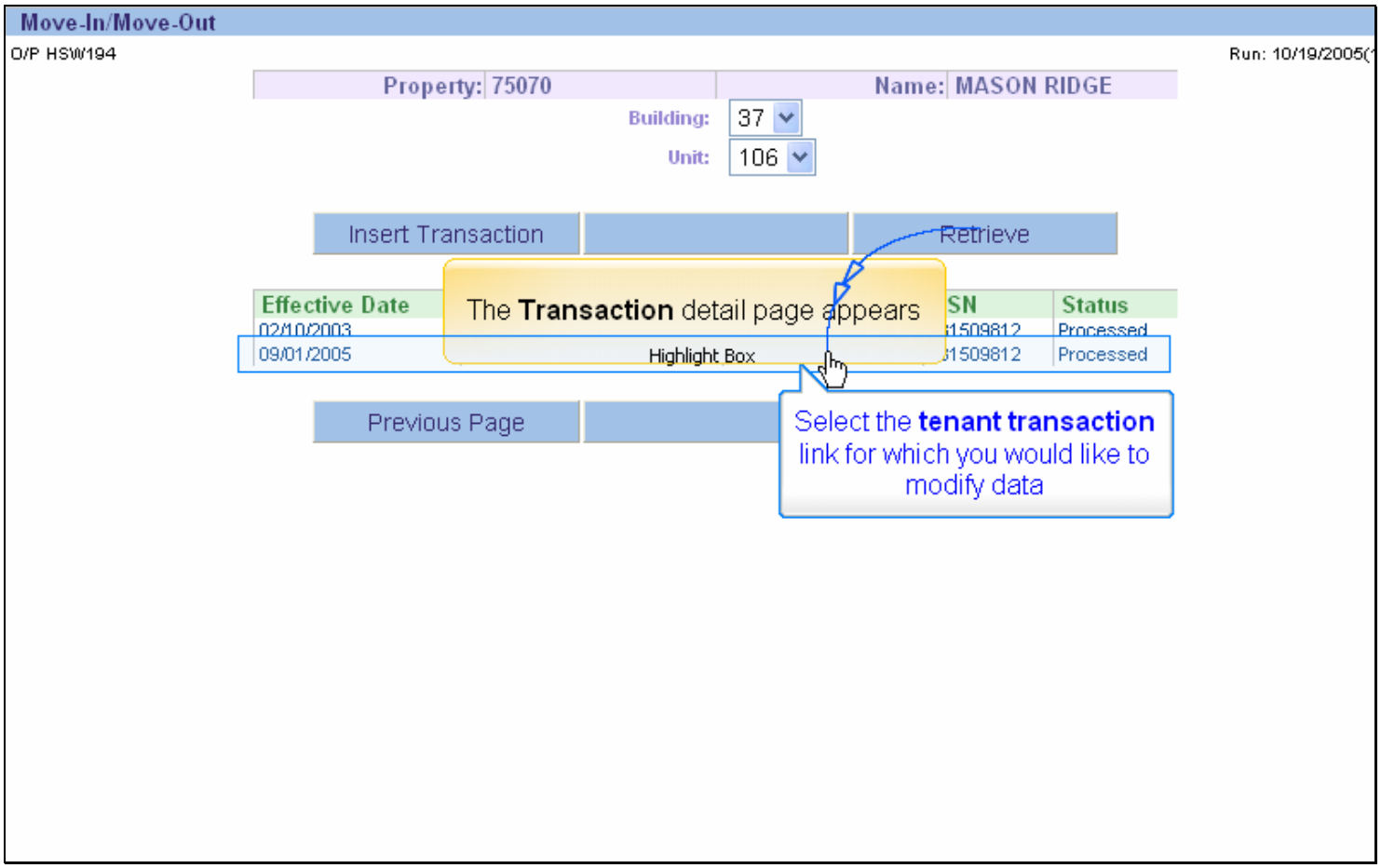


Text Captions

Click the **Retrieve** button to obtain the records for this building and unit

Notes

Slide 50 - Slide 50



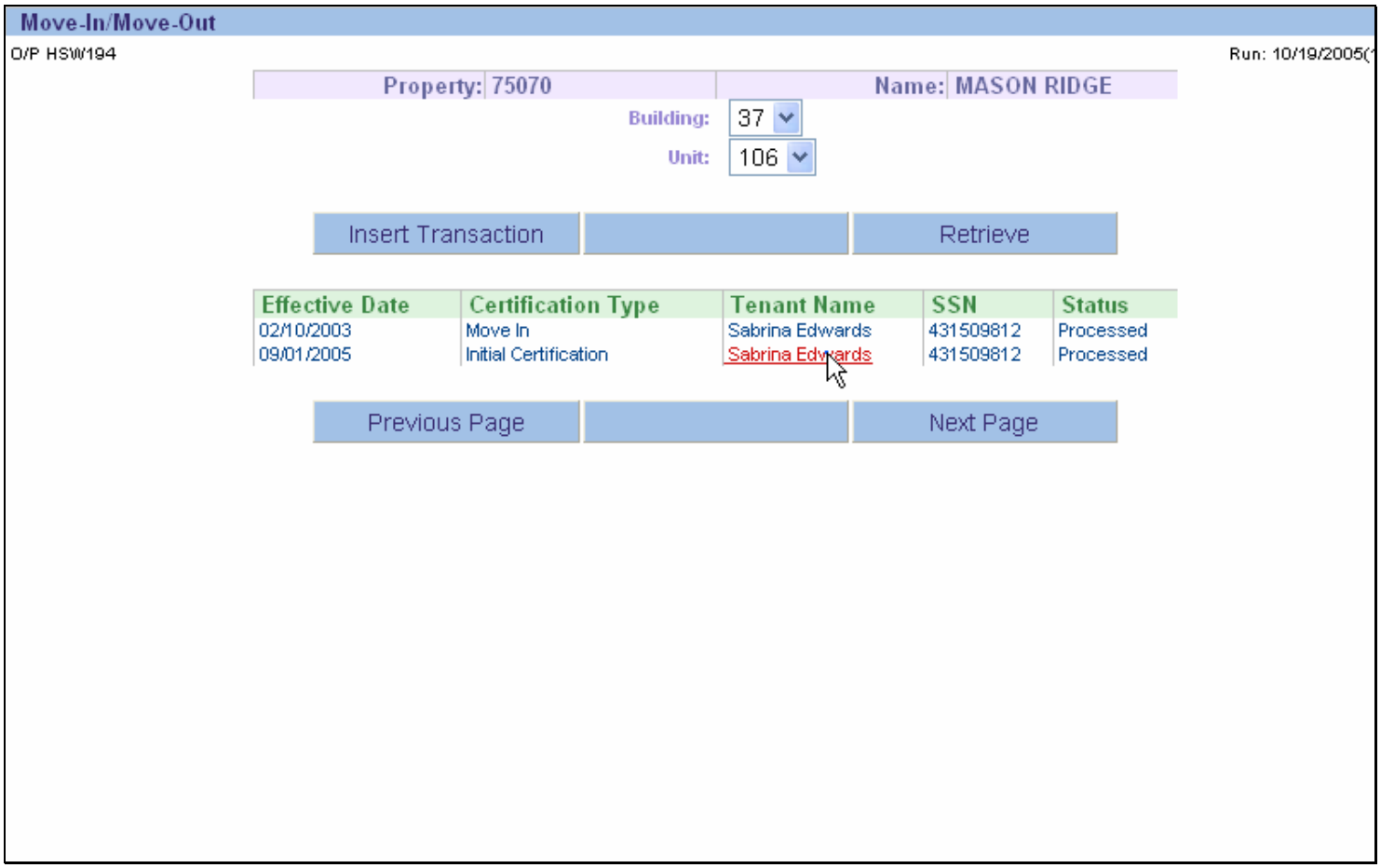
Text Captions

The **Transaction** detail page appears

Select the **tenant transaction** link for which you would like to modify data

Notes

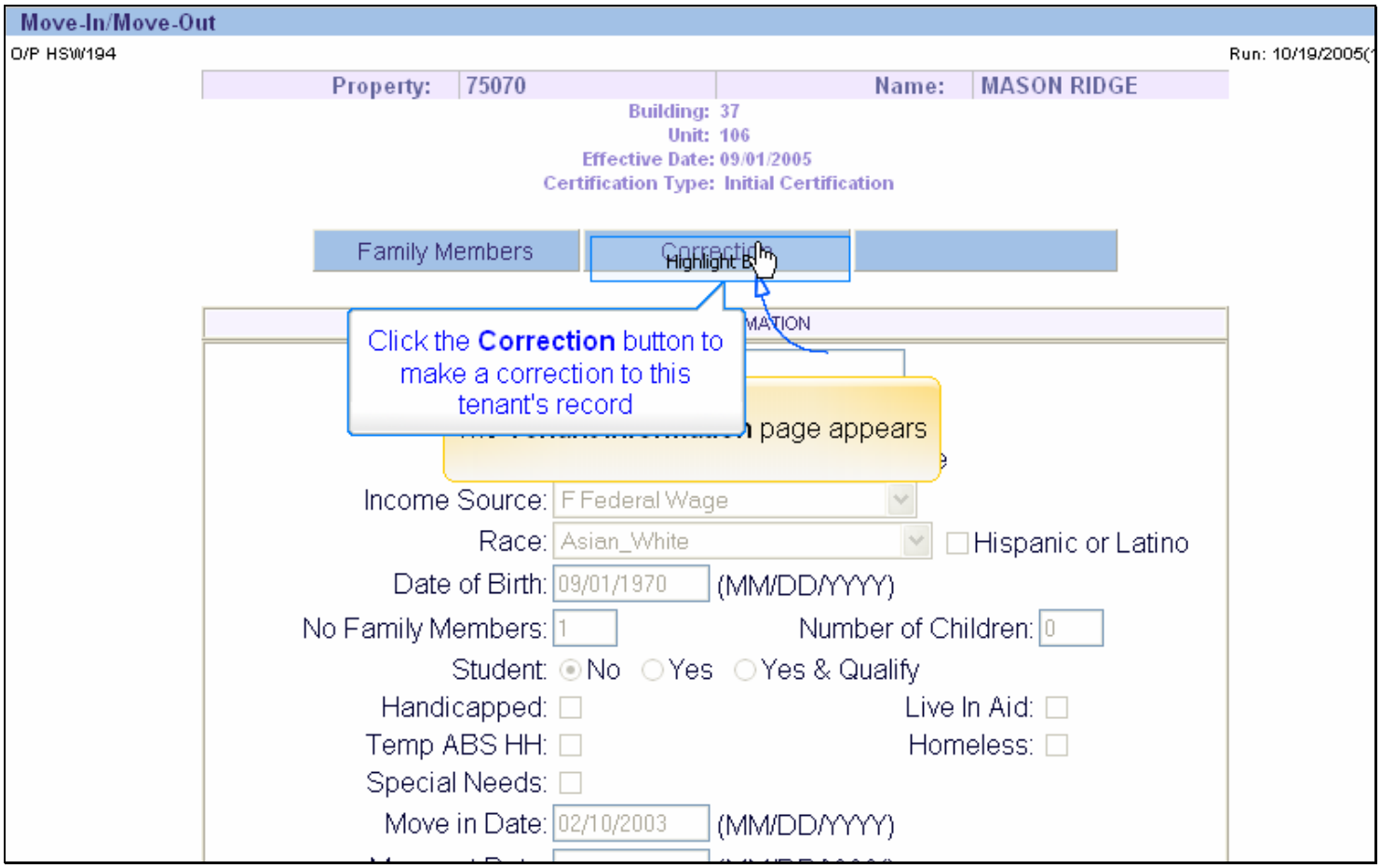
Slide 51 - Slide 51



Text Captions

Notes

Slide 52 - Slide 52



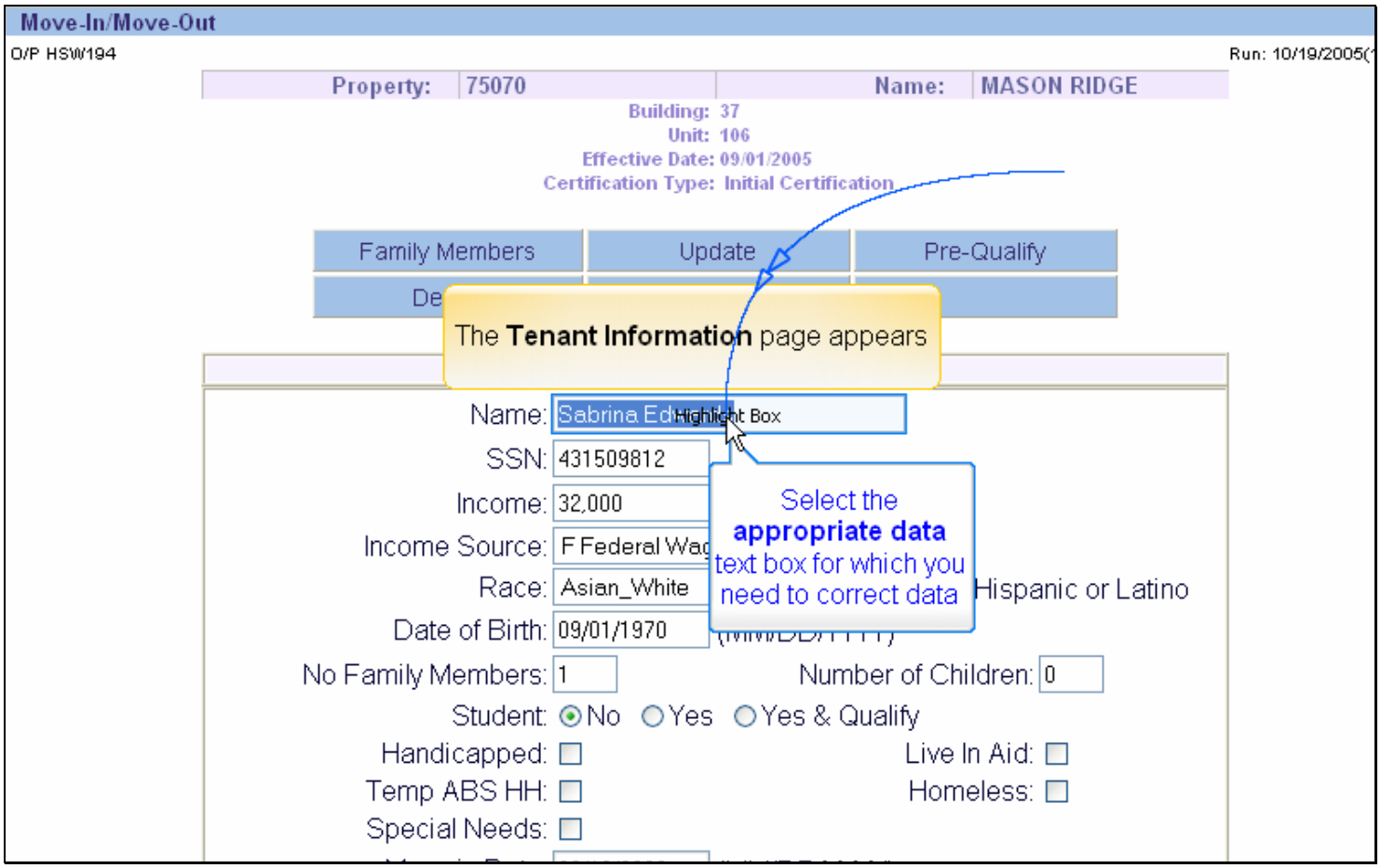
Text Captions

The **Tenant Information** page appears

Click the **Correction** button to make a correction to this tenant's record

Notes

Slide 54 - Slide 54



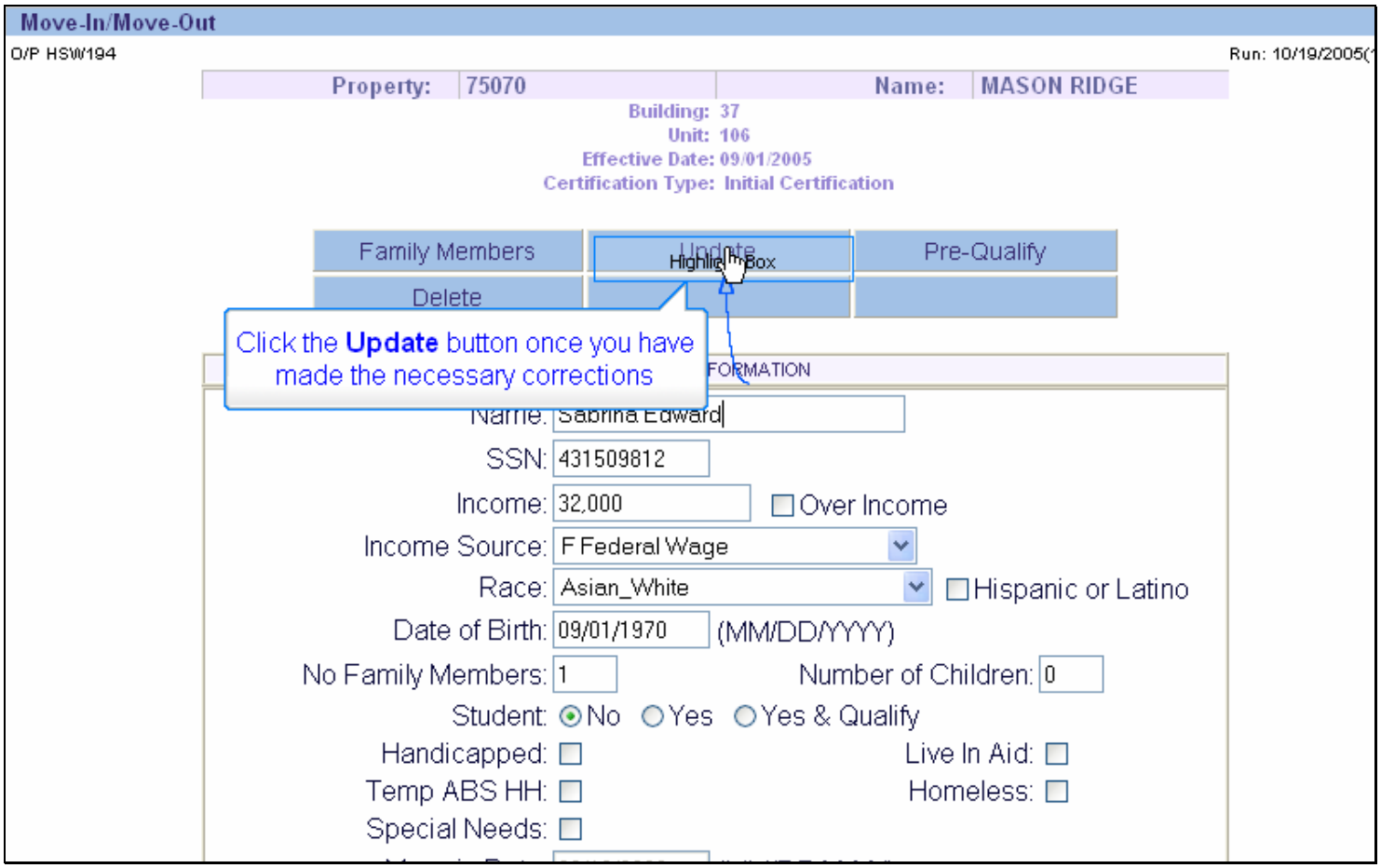
Text Captions

The **Tenant Information** page appears

Select the **appropriate data** text box for which you need to correct data

Notes

Slide 56 - Slide 56

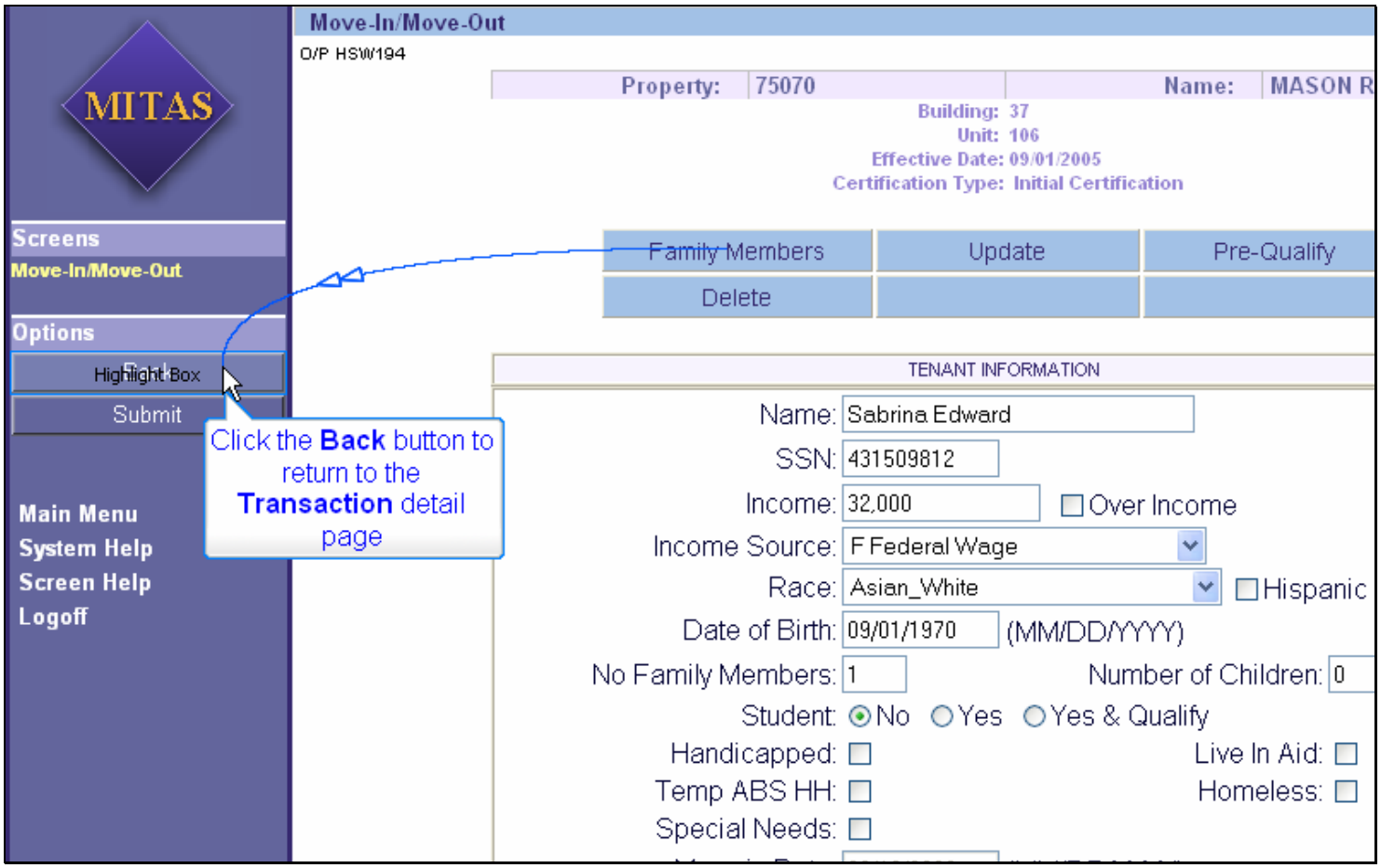


Text Captions

Click the **Update** button once you have made the necessary corrections

Notes

Slide 58 - Slide 58

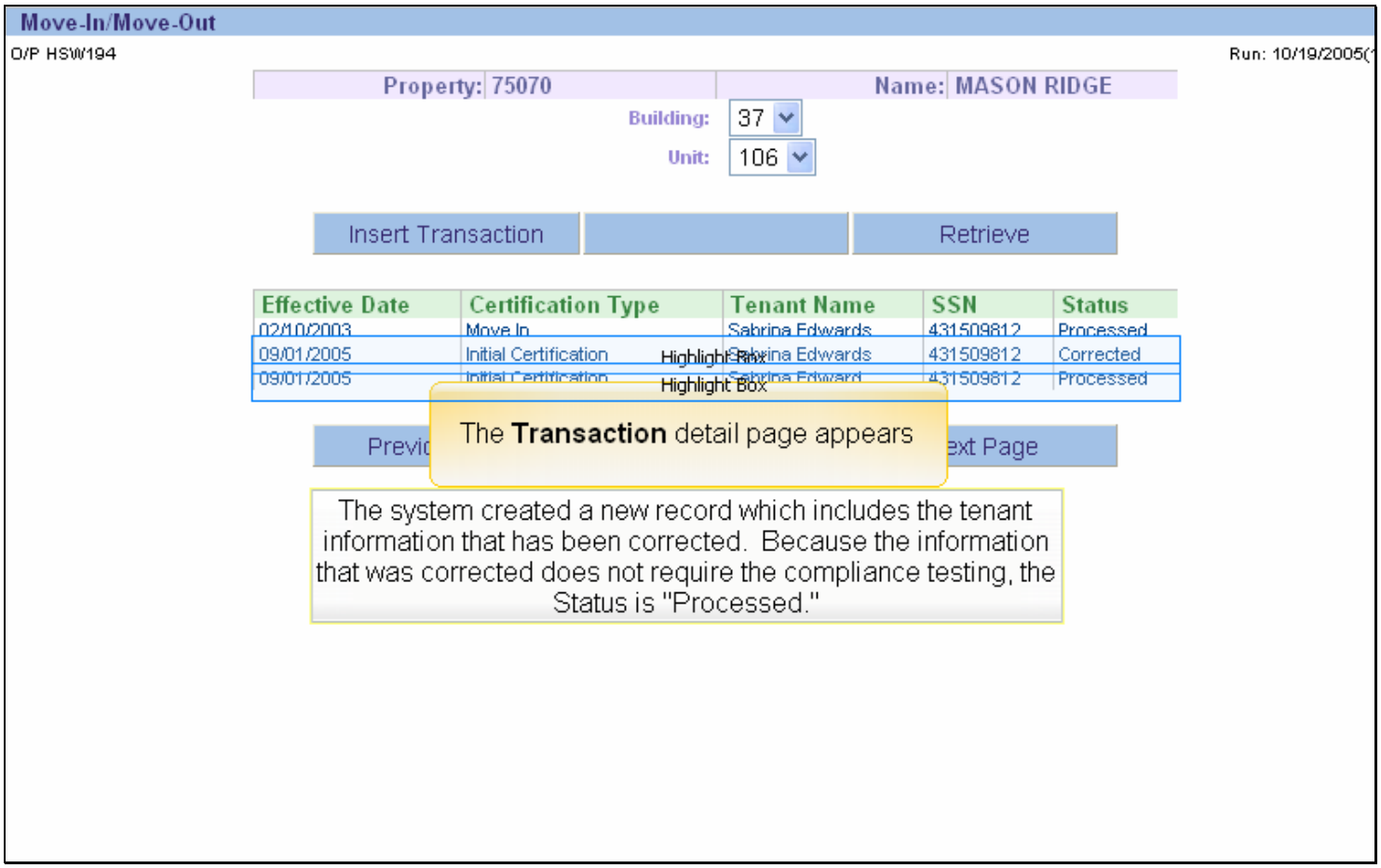


Text Captions

Click the **Back** button to return to the **Transaction** detail page

Notes

Slide 60 - Slide 60



Text Captions

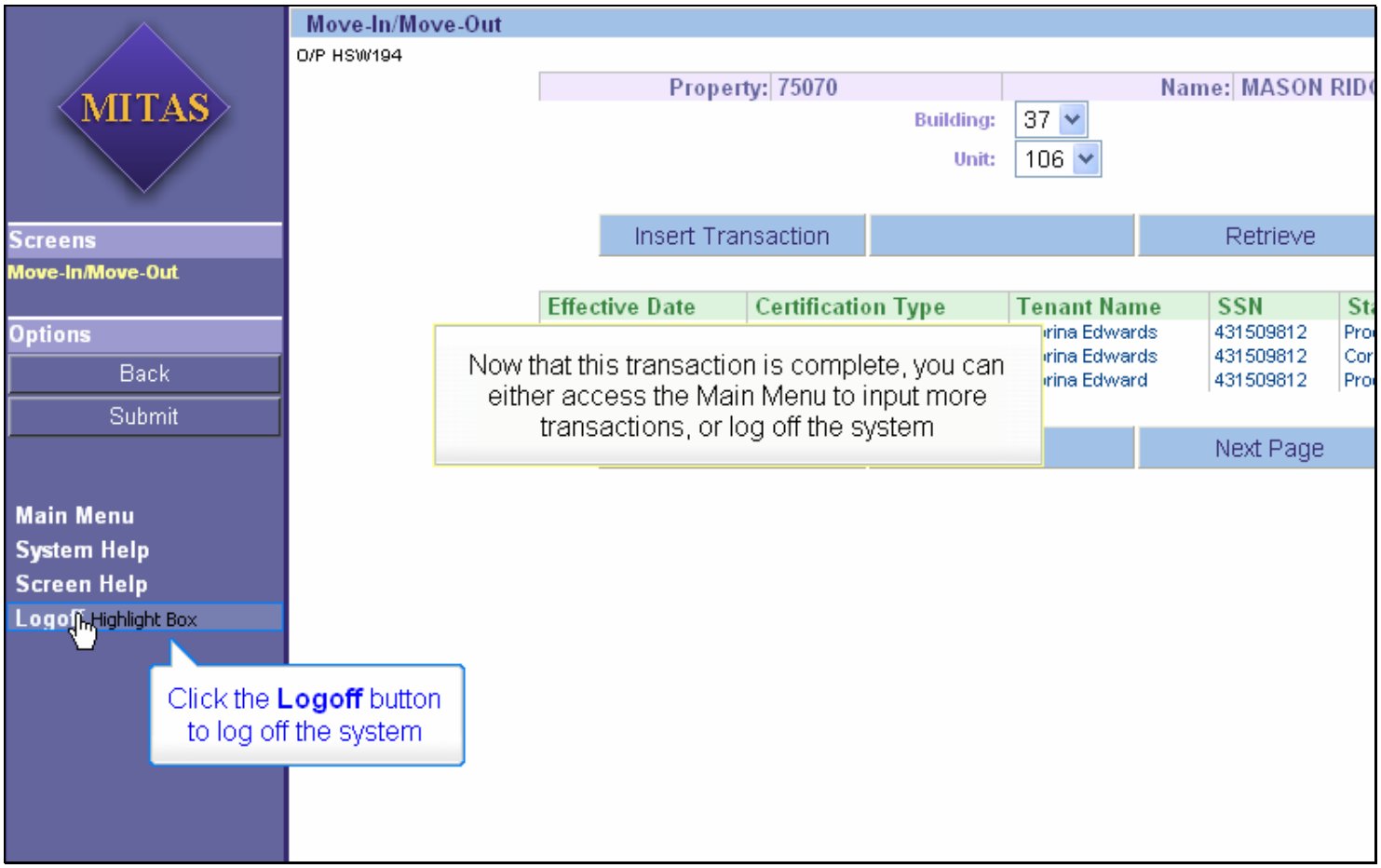
The **Transaction** detail page appears

The original transaction remains, but the Status has been changed to "Corrected."

The system created a new record which includes the tenant information that has been corrected. Because the information that was corrected does not require the compliance testing, the Status is "Processed."

Notes

Slide 61 - Slide 61



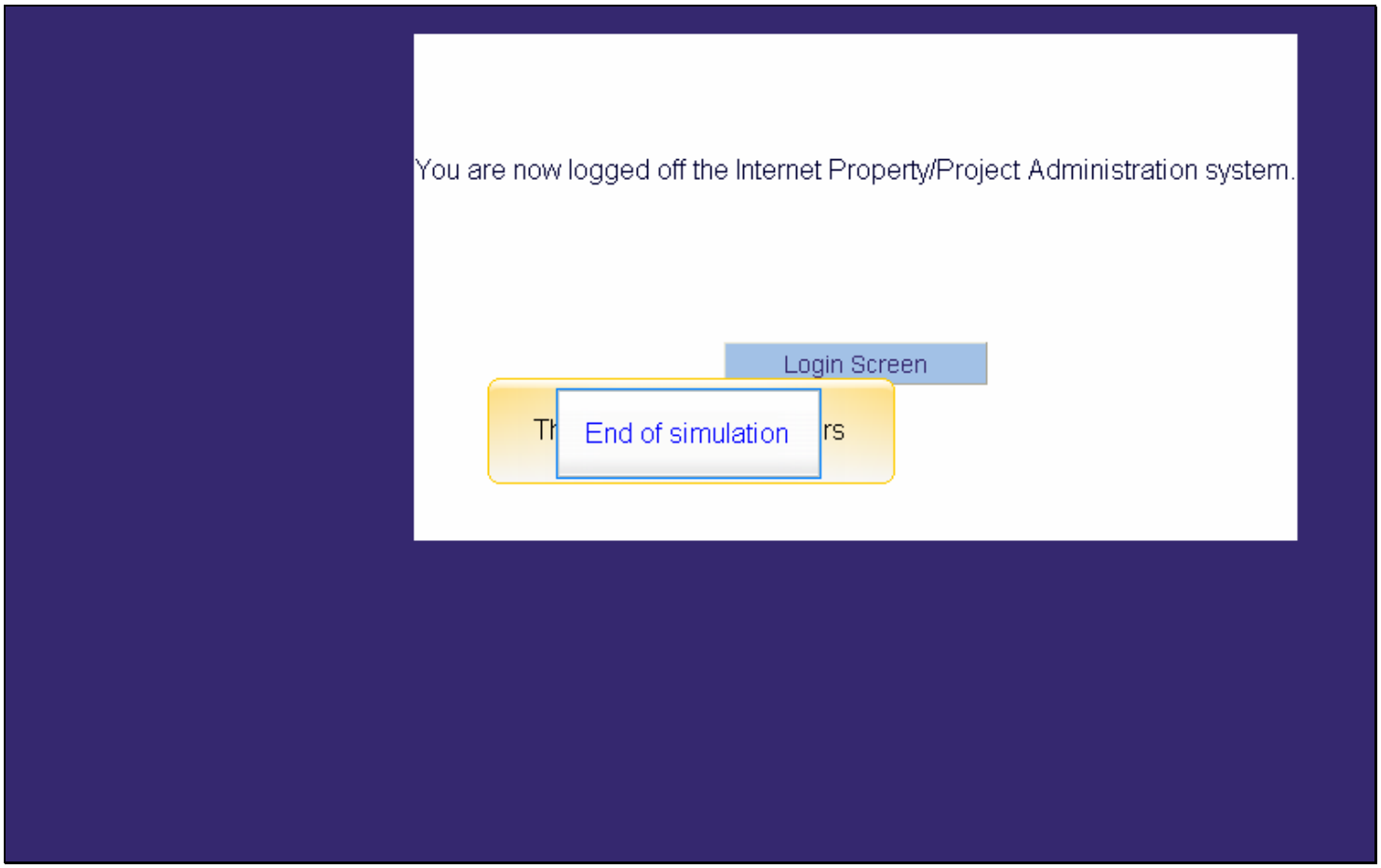
Text Captions

Now that this transaction is complete, you can either access the Main Menu to input more transactions, or log off the system

Click the **Logoff** button to log off the system

Notes

Slide 63 - Slide 63



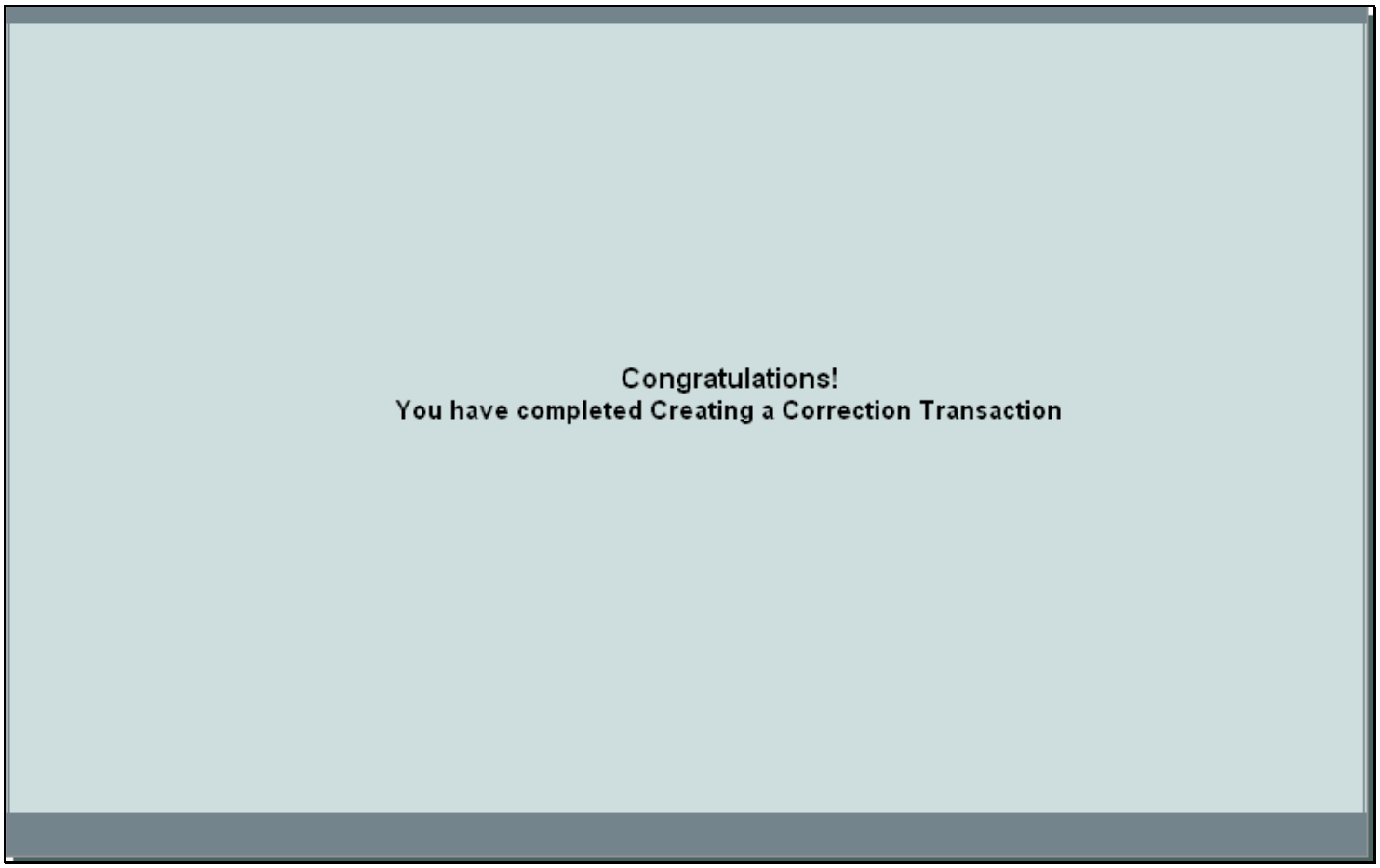
Text Captions

The **Logoff** page appears

End of simulation

Notes

Slide 64 - End



Text Captions

Congratulations!
You have completed Creating a Correction Transaction

Notes