

Slide 1 - Title

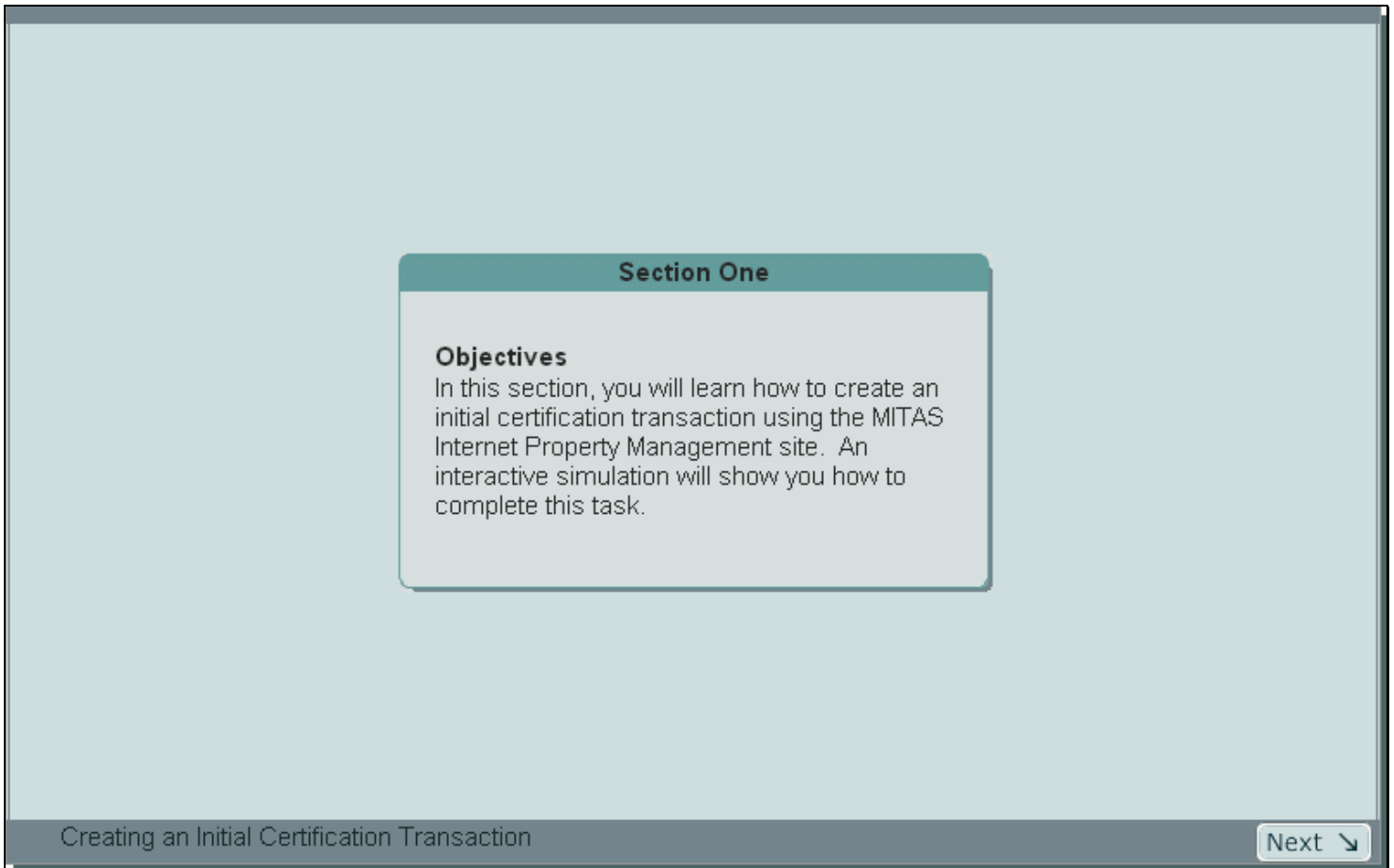


Text Captions

Creating an Initial Certification Transaction

Notes

Slide 2 - Objectives



The slide features a light blue background with a central white box containing the text. At the bottom, there is a dark blue footer bar with the text 'Creating an Initial Certification Transaction' on the left and a 'Next' button with a right-pointing arrow on the right.

Section One

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

Creating an Initial Certification Transaction [Next](#)

Text Captions

Section One**Objectives**

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

Notes

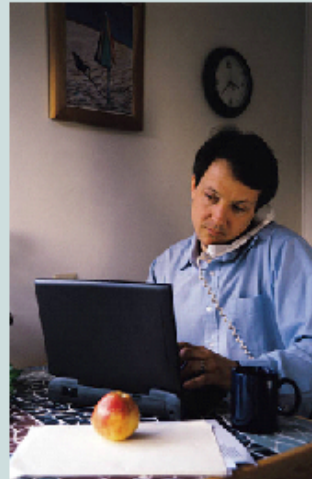
Slide 3 - Scenario

Scenario


Doug, a property manager calls you...

"Hi Becky, I need to create an initial certification for a tenant 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.

Creating an Initial Certification Transaction

Doug at his desk

Next 

Text Captions**Scenario**

Doug, a property manager calls you...

"Hi Becky, I need to create an initial certification for a tenant 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

Definition of an Initial Certification

An **Initial Certification** should be used for *existing tenants* only. This certification is used to change a Market unit to a Low Income unit.

An initial certification transaction is not the same as a move-in transaction. Initial certification transactions are for tenants already living in a market unit that qualify for a new program, and therefore the unit can now be designated as a low income unit. At month end, the system performs the compliance check to verify the tenant is eligible for the program. A move-in transaction should only be used when the tenant first moves in to the unit.

Creating an Initial Certification Transaction Next ▾

Text Captions

Definition of an Initial Certification

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Notes

Slide 5 - Concept

How to Create an Initial Certification

It is easy to create an initial certification 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 **Insert Transaction** option.

Input an **Effective Date** and choose the **Initial Certification** as the Certification Type. Click **Submit** to access the tenant information. Verify and input tenant information, and click **Submit** to submit the transaction.

Creating an Initial Certification Transaction Next ▾

Text Captions

How to Create an Initial Certification

It is easy to create an initial certification 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**.

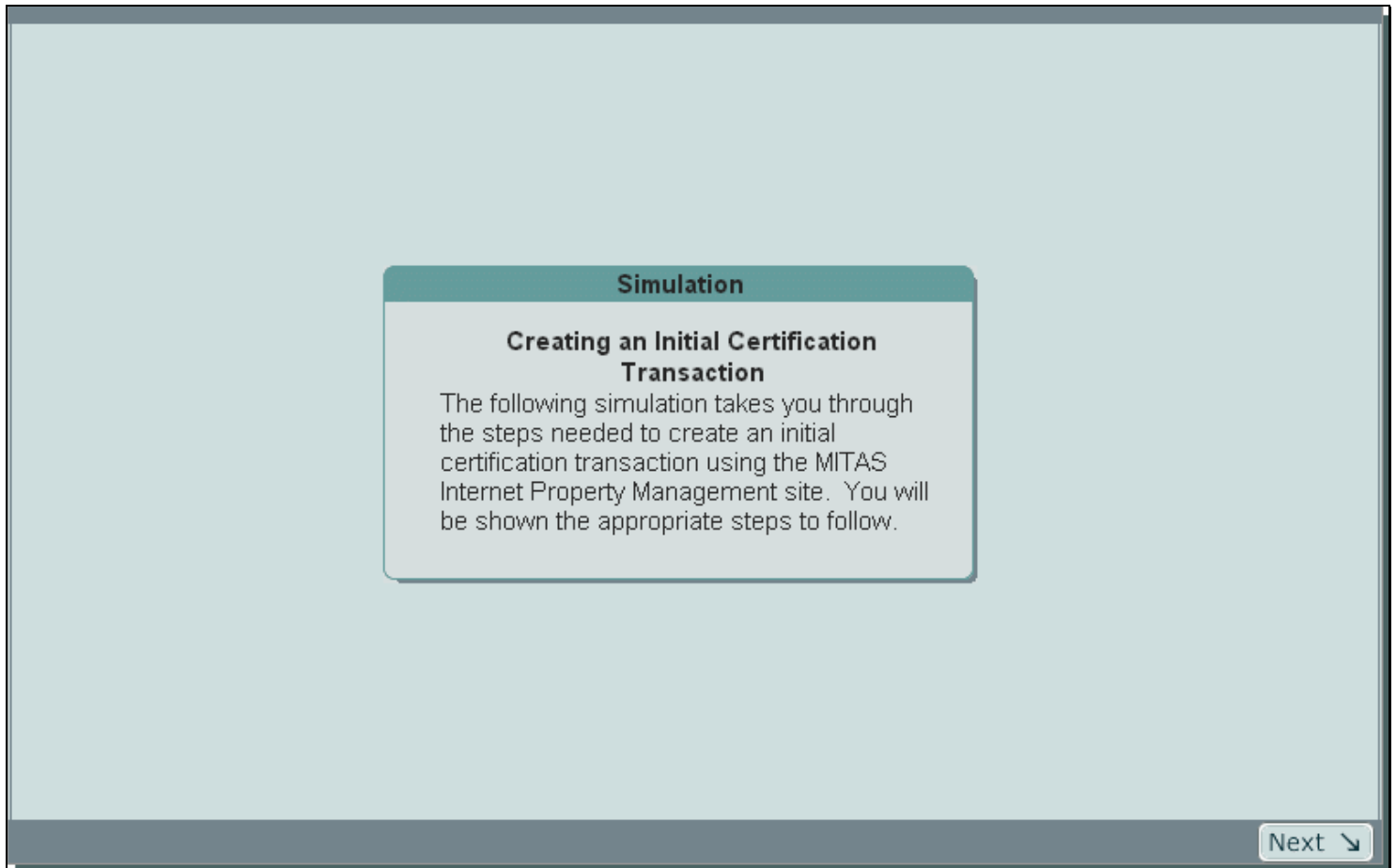
Then you retrieve the property from the **Property Information** screen. Choose the **Transaction** option.

On the **Transaction** screen, choose the corresponding **Building** and **Unit**, and then **Insert Transaction** option.

Input an **Effective Date** and choose the **Initial Certification** as the Certification Type. Click **Submit** to access the tenant information. Verify and input tenant information, and click **Submit** to submit the transaction.

Notes

Slide 6 - Simulation

A slide titled "Simulation" with a sub-heading "Creating an Initial Certification Transaction". The text describes a simulation that guides the user through the steps to create an initial certification transaction on the MITAS Internet Property Management site. A "Next" button with a right-pointing arrow is located in the bottom right corner of the slide frame.

Simulation

Creating an Initial Certification Transaction

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

Next ↘

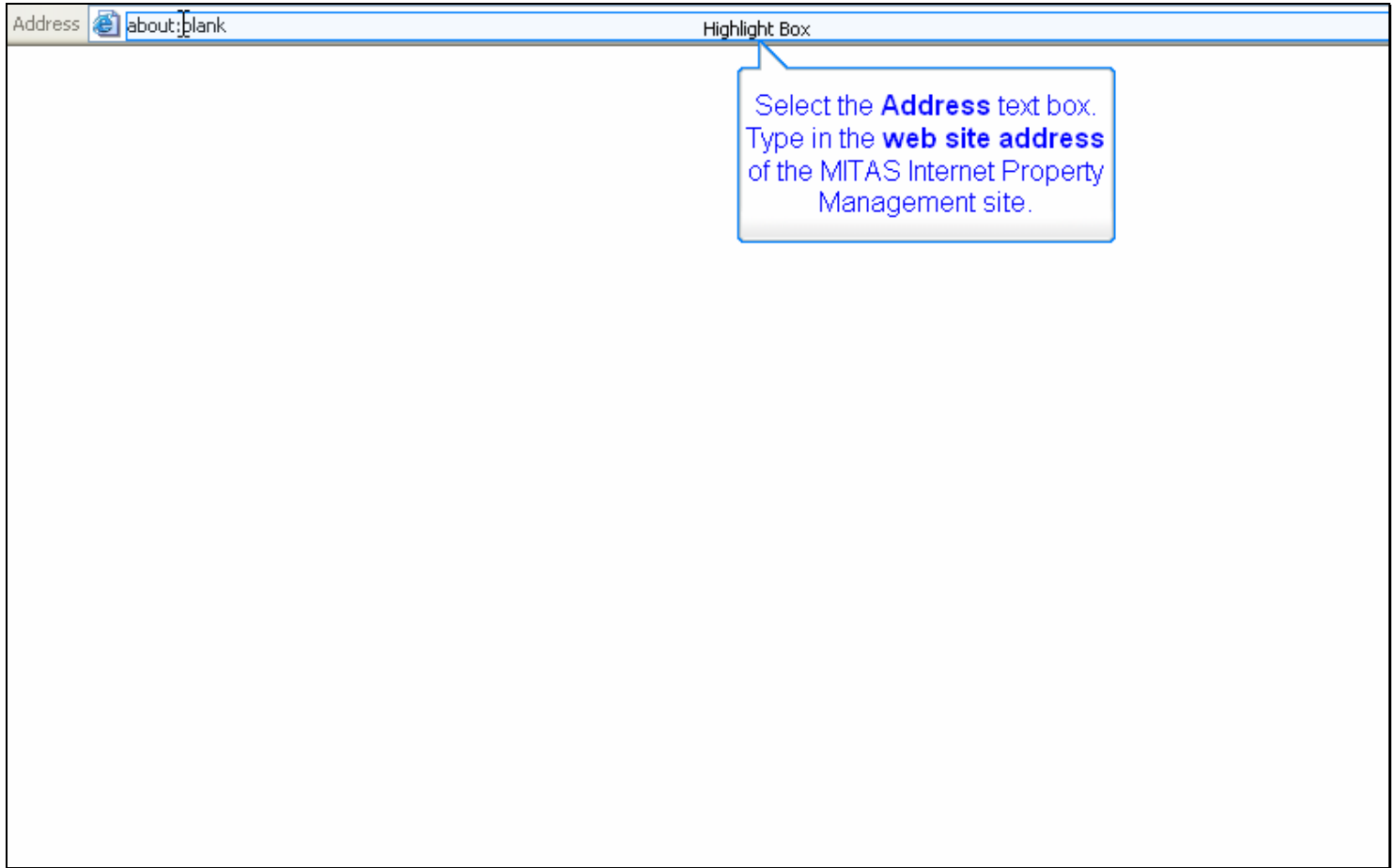
Text Captions

Simulation**Creating an Initial Certification Transaction**

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

Notes

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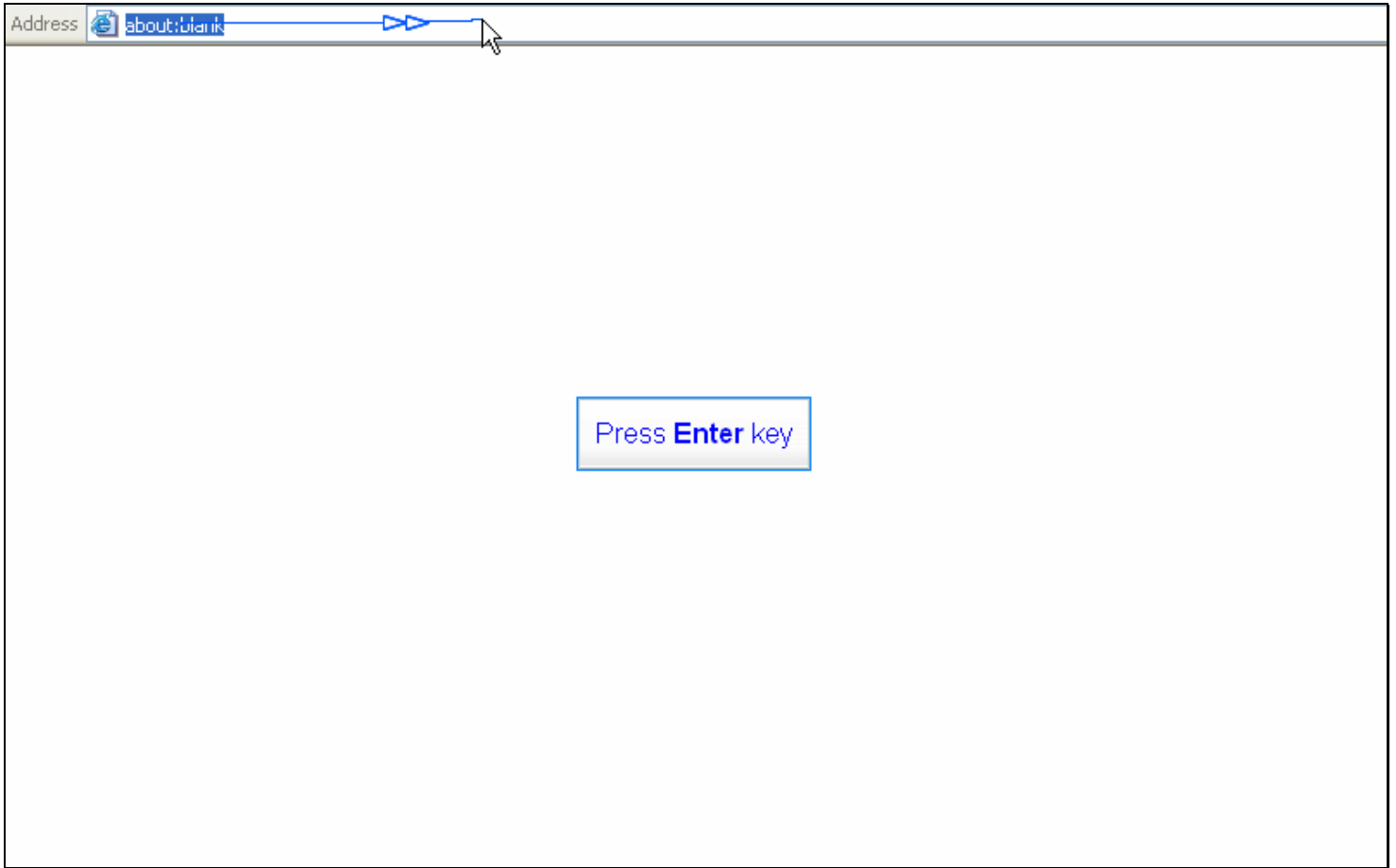


Text Captions

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

Notes

Slide 8 - Slide 8



Press **Enter** key

Text Captions

Press **Enter** key

Notes

Slide 10 - Slide 10

Address http://www.mitas.com/mshda/

MITAS

Welcome to the **MITAS**
Internet Property Management Site

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

Please log in:

Web Profile: Lender

Originator:

Branch:

Username:

Password:

Password is case sensitive.

Login Clear

Select the **Web Profile** combo box

Text Captions

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

Select the **Web Profile** combo box

Notes

Slide 11 - Slide 11

Address  http://www.mitas.com/mshda/



Welcome to the MITAS Internet Property Management Site

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.

Please log in:

Web Profile:

Originator:

Branch:

Username:

Password:

Password

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

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

The screenshot shows the MITAS website login page. The address bar displays "http://www.mitas.com/mshda/". The page features a purple header with the MITAS logo on the left and the text "Welcome to the MITAS Internet Management Site" on the right. A yellow callout box explains the Property Manager Number. The login form includes a "Please log in:" section with a "Web Profile" dropdown menu set to "Property Manager", a "Property Manager Number" field with a "Highlight Box" annotation, "Username:" and "Password:" fields, a "Password is" label, and a "Login" button. A blue callout box points to the "Property Manager Number" field with the instruction: "Select the Property Manager Number text box, and input the appropriate number".

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

Address http://www.mitas.com/mshda/

Welcome to the **MITAS**
Internet Property Management Site

Please log in:

Web Profile: Property Manager

Property Manager Number:

Username: Highlight Box

Password:

Password is case sensitive

Login

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

Text Captions

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

Notes

Slide 14 - Slide 14

Address http://www.mitas.com/mshda/

Welcome to the **MITAS**
Internet Property Management Site

Please log in:

Web Profile: Property Manager

Property Manager Number: 1

Username: |

Password: Highlight Box

Password is case sensitive

Login

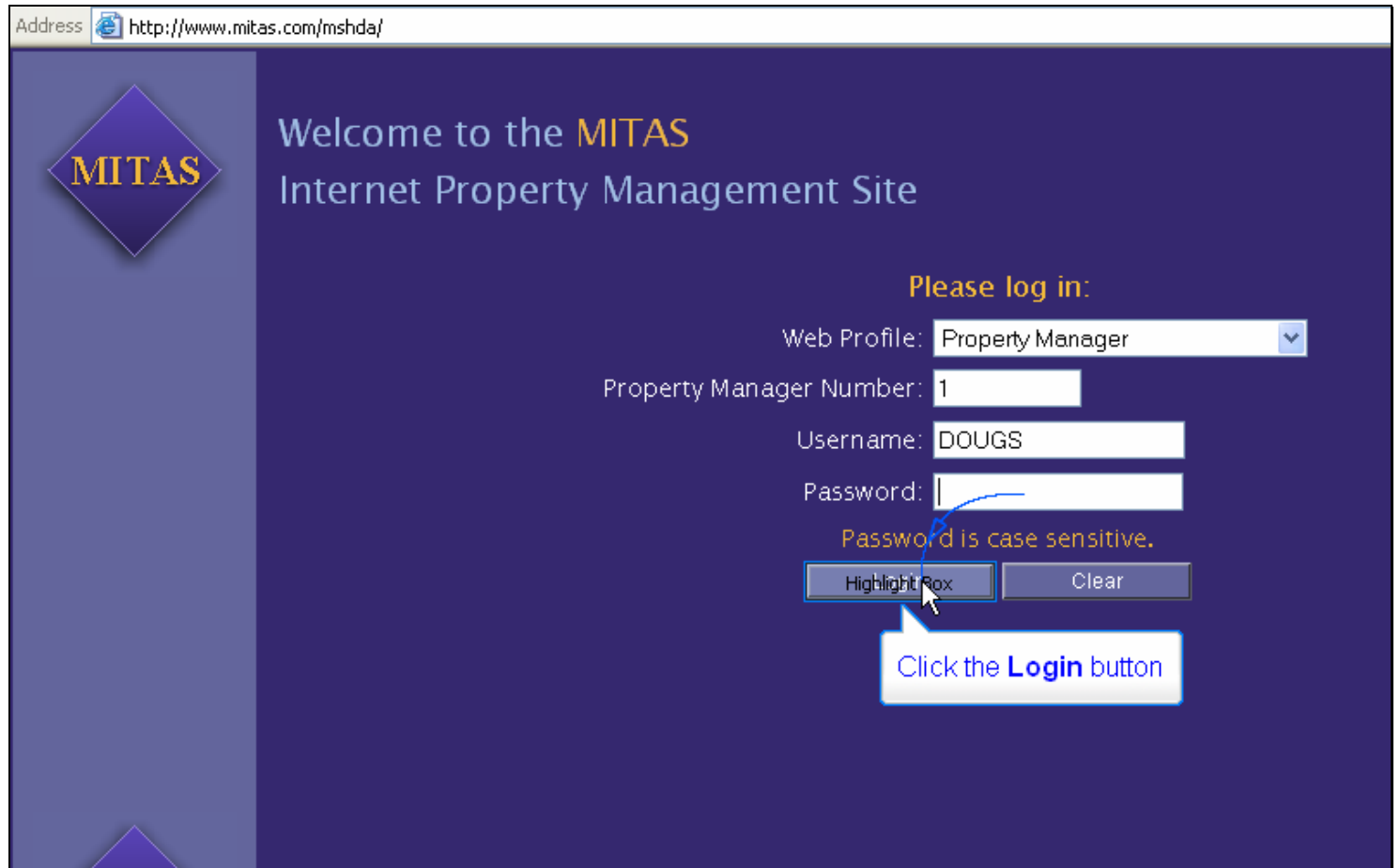
Select the **Password** text box, and input your password

Text Captions

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

Notes

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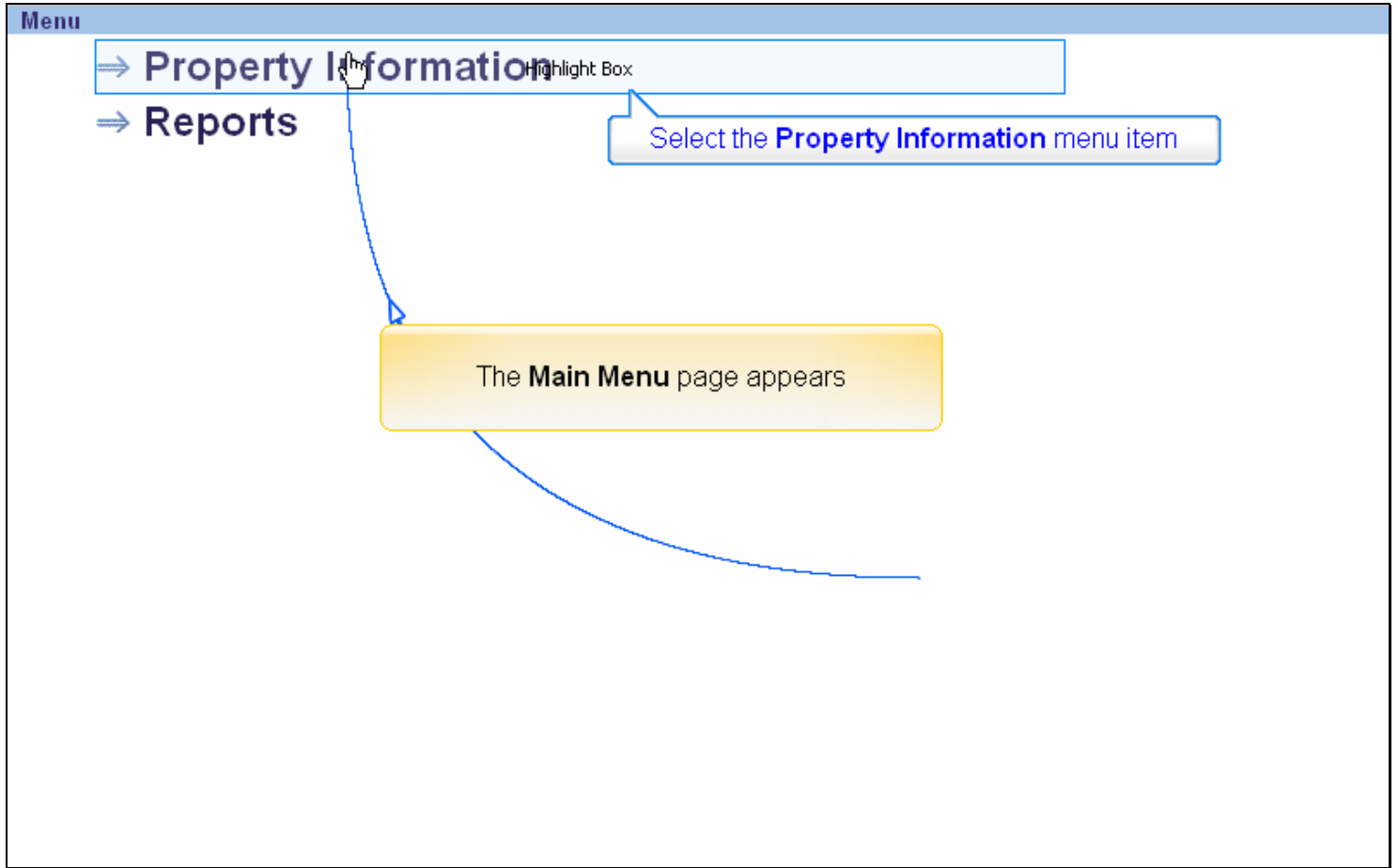


Text Captions

Click the **Login** button

Notes

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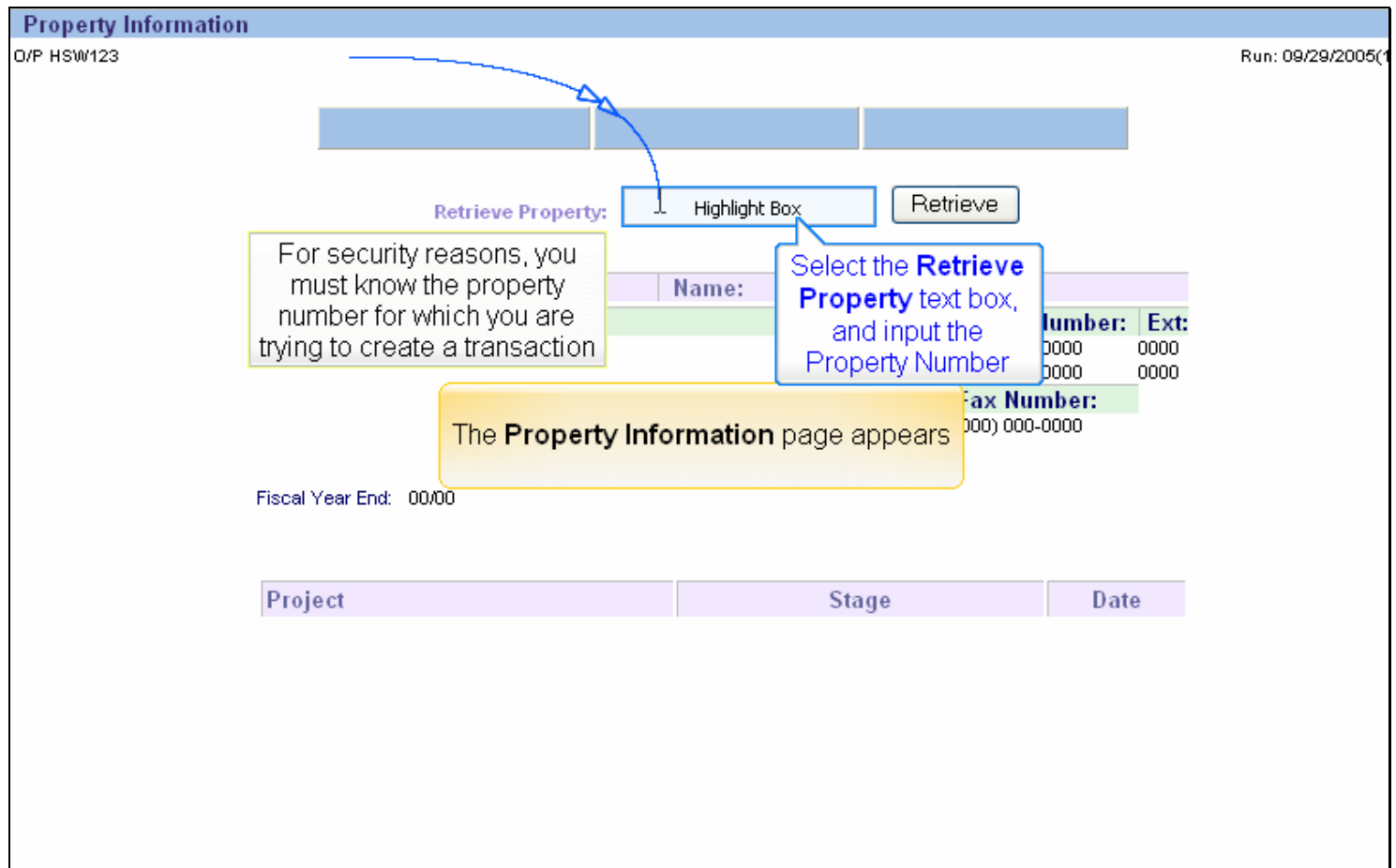
Text Captions

The **Main Menu** page appears

Select the **Property Information** menu item

Notes

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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

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Property Information

O/P HSW123 Run: 09/29/2005(1

[Redacted] [Redacted] [Redacted]

Retrieve Property:

Property: 999999999999

Property Address: Phone Number: Ext:

(000) 000-0000 0000
(000) 000-0000 0000

Fax Number:

(000) 000-0000

Fiscal Year End: 00/00

Project	Stage	Date
---------	-------	------

Text Captions

Click the **Retrieve** button

Notes

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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 an Initial Certification transaction

Notes

Slide 24 - Slide 24

Move-In/Move-Out

O/P HSW194 Run: 09/29/2005(1

Property: 75070 Name: MASON RIDGE

Building: 37

Unit: 100

Insert Transaction

Effective Date	Certification Type	Tenant Name	SSN	Status
08/01/2002	Move In	Lori Cooke	369874103	Processed
08/01/2003	Recertification	Lori Cooke	369874103	Processed
06/15/2005			369874103	Corrected
07/15/2005			94433221	Corrected

Previous Next Page

The **Transaction** page appears

Select the **Building** combo box

Text Captions

The **Transaction** page appears

Select the **Building** combo box

Notes

Slide 25 - Slide 25

Move-In/Move-Out

O/P HSW194 Run: 09/29/2005(1

Property: 75070 Name: MASON RIDGE

Building: 37
Unit: 37

Insert Transaction

Effective Date	Certification Type	T		Status
08/01/2002	Move In	Lo	3	Processed
08/01/2003	Recertification	Lori Cooke	369874103	Processed
06/15/2005	Move Out	Lori Cooke	369874103	Corrected
07/15/2005	Move In	Jack Thompson	994433221	Corrected

Previous Page Next Page

Select the appropriate building number item

Text Captions

Select the appropriate building number item

Notes

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Move-In/Move-Out

O/P HSW194 Run: 09/29/2005(1

Property: 75070 Name: MASON RIDGE

Building: 37

Unit: 100

Insert Transaction

Select the **Unit** combo box

Effective Date	Certification Type	Tenant Name	SSN	Status
08/01/2002	Move In	Lori Cooke	369874103	Processed
08/01/2003	Recertification	Lori Cooke	369874103	Processed
06/15/2005	Move Out	Lori Cooke	369874103	Corrected
07/15/2005	Move In	Jack Thompson	994433221	Corrected

Previous Page Next Page

Text Captions

Select the **Unit** combo box

Notes

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Move-In/Move-Out

O/P HSW194 Run: 09/29/2005(1

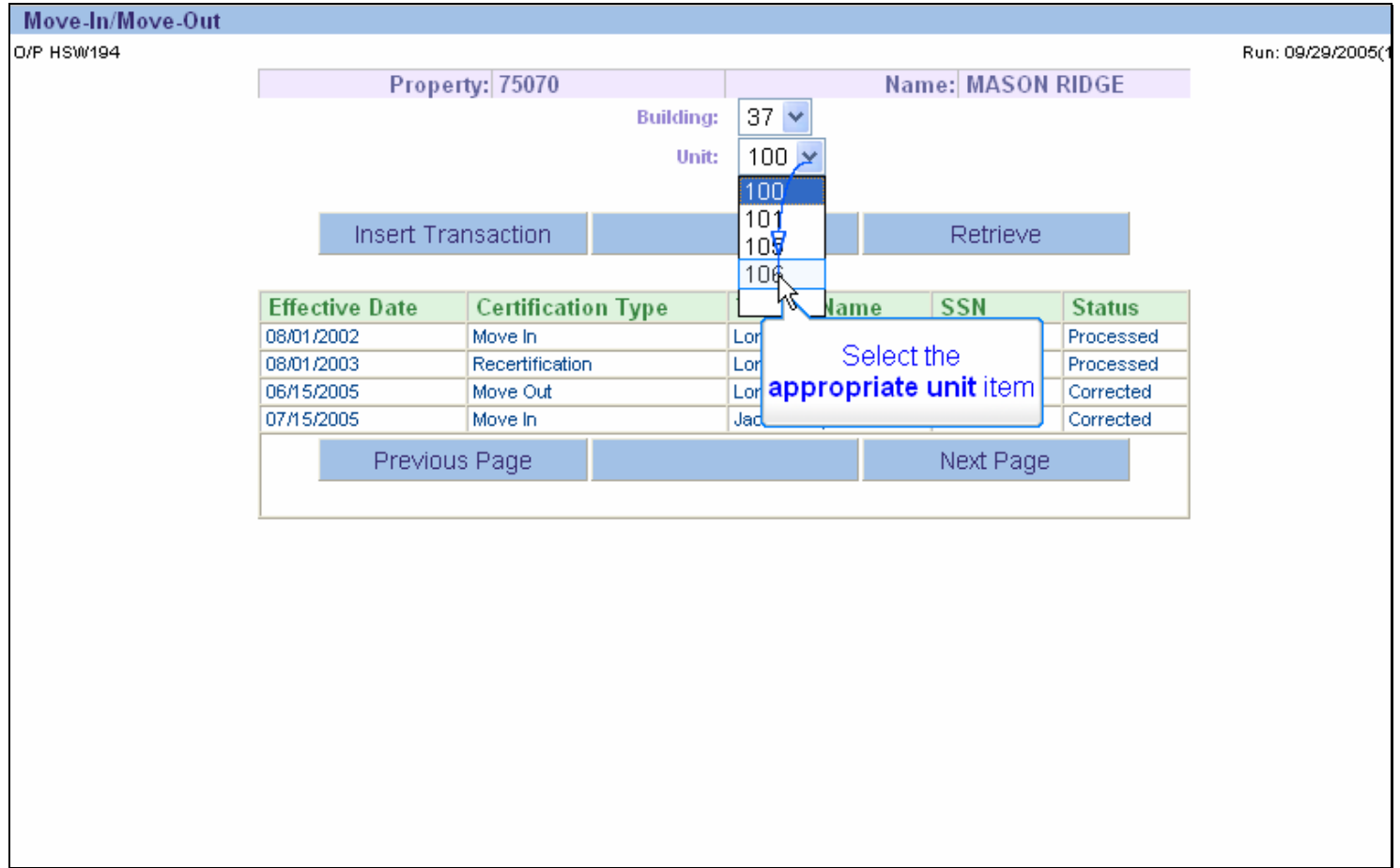
Property: 75070 Name: MASON RIDGE

Building: 37
Unit: 100

Insert Transaction Retrieve

Effective Date	Certification Type	Name	SSN	Status
08/01/2002	Move In	Lor		Processed
08/01/2003	Recertification	Lor		Processed
06/15/2005	Move Out	Lor		Corrected
07/15/2005	Move In	Jac		Corrected

Previous Page Next Page



Text Captions

Select the **appropriate unit item**

Notes

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Move-In/Move-Out

O/P HSW194 Run: 09/29/2005(1

Property: 75070 Name: MASON RIDGE

Building: 37

Unit: 106

Insert Transaction Retrieve

Effective Date			SSN	Status
08/01/2002			369874103	Processed
08/01/2003			369874103	Processed
06/15/2005	Move Out	Lori Cooke	369874103	Corrected
07/15/2005	Move In	Jack Thompson	994433221	Corrected

Previous Page Next Page

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

Text Captions

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

Notes

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Move-In/Move-Out

O/P HSW194 Run: 09/29/2005(1

Property: 75070 Name: MASON RIDGE

Building: 37

Unit: 106

Insert Transaction

Effective Date

Effective Date	SSN	Status
02/10/2003	#31509812	Processed

All transactions are shown on this page for this building's unit

Click the **Insert Transaction** button to create an Initial Certification transaction

Text Captions

The **Transaction** page appears

All transactions are shown on this page for this building's unit

Click the **Insert Transaction** button to create an Initial Certification transaction

Notes

Slide 32 - Slide 32

Move-In/Move-Out

O/P HSW194 Run: 09/29/2005(1

Property: 75070	Name: MASON RIDGE
Building: 37	
Unit: 106	
Effective Date: <input type="text" value="Highlight Box"/> (MM/DD/YYYY)	
Certification Type: Move	

Please complete the following s on.

An **Initial Certification** is reserved for existing tenants only. This certification is used to change a Market unit to a Low Income unit.

Note: An initial certification transaction is not the same as a move-in transaction. Initial certification transactions are for tenants already living in a market unit that qualify for a new program, and therefore the unit can now be designated as a low income unit. At month end, the system performs the compliance check to verify the tenant is eligible for the program. A move-in transaction should only be used when the tenant first moves in to the unit.

Select the **Effective Date** text box, and input the date of the initial certification

Text Captions

The **Transaction** detail (date and type) page appears

An **Initial Certification** is reserved for *existing tenants* only. This certification is used to change a Market unit to a Low Income unit.

Note: An initial certification transaction is not the same as a move-in transaction. Initial certification transactions are for tenants already living in a market unit that qualify for a new program, and therefore the unit can now be designated as a low income unit. At month end, the system performs the compliance check to verify the tenant is eligible for the program. A move-in transaction should only be used when the tenant first moves in to the unit.

Select the **Effective Date** text box, and input the date of the initial certification

Notes

Slide 33 - Slide 33

Move-In/Move-Out

O/P HSW194 Run: 09/29/2005(1

Property: 75070	Name: MASON RIDGE
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Building: 37
Unit: 106

Effective Date: (MM/DD/YYYY)

Certification Type:

Please complete the following information for this transfer transaction.

Transfer Building:

Transfer Unit:

Select the **Certification Type** combo box

Text Captions

Select the **Certification Type** combo box

Notes

Slide 34 - Slide 34

Move-In/Move-Out

O/P HSW194 Run: 09/29/2005(1

Property:	75070	Name:	MASON RIDGE
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Building: 37
Unit: 106

Effective Date: 09/01/2005 (MM/DD/YYYY)

Certification Type: Move In

Please complete the following information for this transfer transaction.

Transfer Building: _____

Transfer Unit: _____

Submittal: _____

- Move In
- Move Out
- Unit Transfer
- Recertification
- Interim Recertification
- Initial Certification
- Gross Rent Change
- Termination

Select the **Initial Certification** item

Text Captions

Select the **Initial Certification** item

Notes

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Move-In/Move-Out

O/P HSW194 Run: 09/29/2005(1

Property: 75070	Name: MASON RIDGE
-----------------	-------------------

Building: 37
Unit: 106

Effective Date: (MM/DD/YYYY)

Certification Type: ▼

Please complete the following section if inserting Unit Transfer transaction.

Transfer Building: ▼

Transfer Unit: ▼

Highlight Box

Click the **Submit** button

Text Captions

Click the **Submit** button

Notes

Slide 37 - Slide 37

Move-In/Move-Out

O/P HSW194
Run: 09/29/2005(1

Property: 75070	Name: MASON RIDGE
Building: 37	
Unit: 106	
Effective Date: 09/01/2005	
Certification Type: Initial Certification	

Tenant	Family Members
Submit	

TENANT INFORMATION

Verify the tenant information inputting any missing information

Income: Over Income

Income Source:

Race: Hispanic or Latino

Date of Birth: (MM/DD/YYYY)

No Family Members: Number of Children:

Student: No Yes Yes & Qualify

Handicapped: Live In Aid:

Temp ABS HH: Homeless:

Special Needs:

Text Captions

The **Transaction Tenant Information** page appears

Verify the tenant information inputting any missing information

Notes

Slide 38 - Slide 38

Move-In/Move-Out

O/P HSW194 Run: 09/29/2005(1

Property: 75070	Name: MASON RIDGE
------------------------	--------------------------

Building: 37
 Unit: 106
 Effective Date: 09/01/2005
 Certification Type: Initial Certification

Tenant		Family Members
	Submit	

INFORMATION

Income: 32,000 Over Income

Income Source: F Federal Wage

Race: Asian_White Hispanic or Latino

Date of Birth: 09/01/1970 (MM/DD/YYYY)

No Family Members: 1 Number of Children: 0

Student: No Yes Yes & Qualify

Handicapped: Live In Aid:

Temp ABS HH: Homeless:

Special Needs:

Click the **Submit** button once you have updated all the tenant information

Text Captions

Click the **Submit** button once you have updated all the tenant information

Notes

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Move-In/Move-Out

O/P HSW194 Run: 09/29/2005(1

Property: 75070 Name: MASON RIDGE

Building: 37

Unit: 106

Insert Transaction Retrieve

Effective Date	Certification Type	Tenant Name	SSN	Status
02/10/2003	Move In	Sabrina Edwards	431509812	Processed
09/01/2005	Initial Certification	Sabrina Edwards	431509812	Not-Processed

Previous Next Page

The **Transaction** detail page appears

Text Captions

The **Transaction** detail page appears

Notes

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MITAS

Move-In/Move-Out
O/P HSW194

Property: 75070 Name: MASON RIDG
 Building: 37
 Unit: 106

Insert Transaction Retrieve

Effective Date	Certification Type	Tenant Name	SSN	Status
02/10/2003	Move In	Sabrina Edwards	431509812	Process
09/01/2005	Initial Certification	Sabrina Edwards	431509812	Not-Proc

Back Submit Next Page

Main Menu
 System Help
 Screen Help
Logoff Highlight Box

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

Text Captions

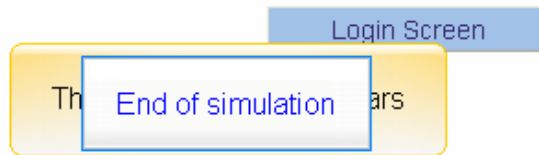
Now that this transaction is complete, you can either access the main menu to input more transactions, or log off the system

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

Notes

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You are now logged off the Internet Property/Project Administration system.




Text Captions

The **Loggoff** page appears

End of simulation

Notes

Slide 44 - End



Congratulations!
You have completed Creating an Initial Certification

Text Captions

Congratulations!
You have completed Creating an Initial Certification

Notes