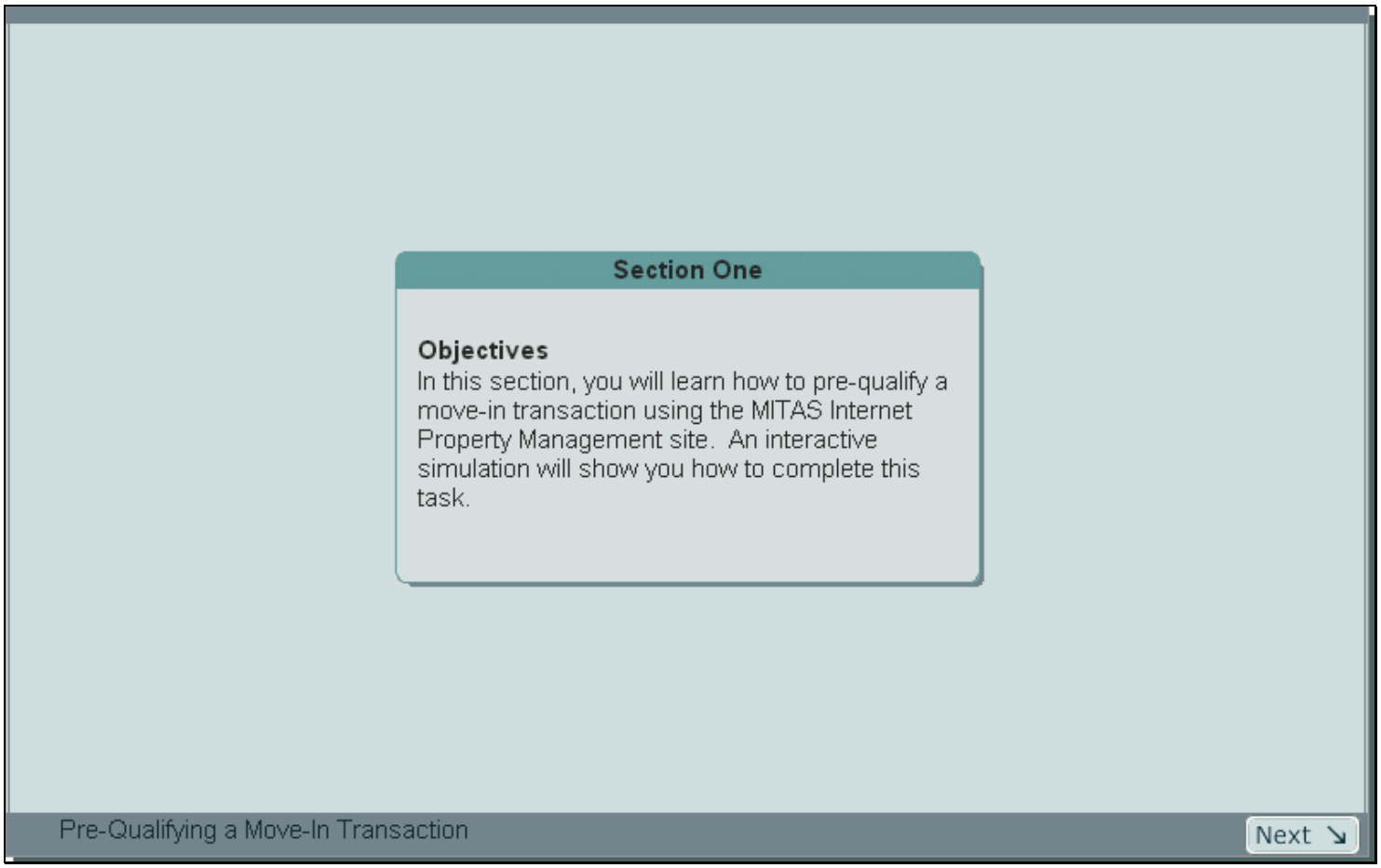
Slide 1 - Title

Text Captions

Pre-Qualifying a Move-In Transaction

Notes

Slide 2 - Objectives



Text Captions

Section One

Objectives
In this section, you will learn how to pre-qualify a move-in 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

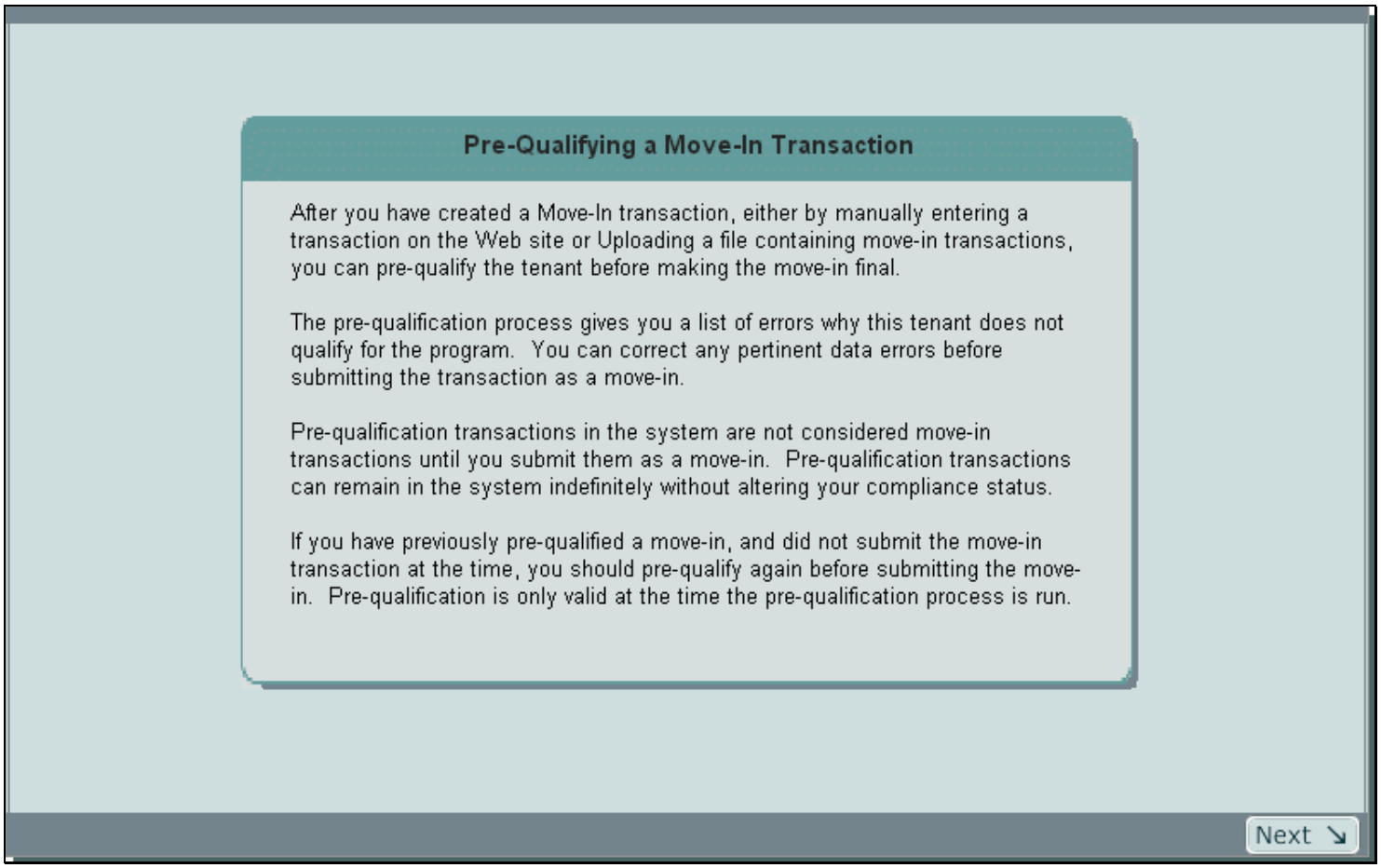
Doug, a property manager calls you...

"Hi Becky, I need to pre-qualify a move-in 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

Pre-Qualifying a Move-In Transaction

After you have created a Move-In transaction, either by manually entering a transaction on the Web site or Uploading a file containing move-in transactions, you can pre-qualify the tenant before making the move-in final.

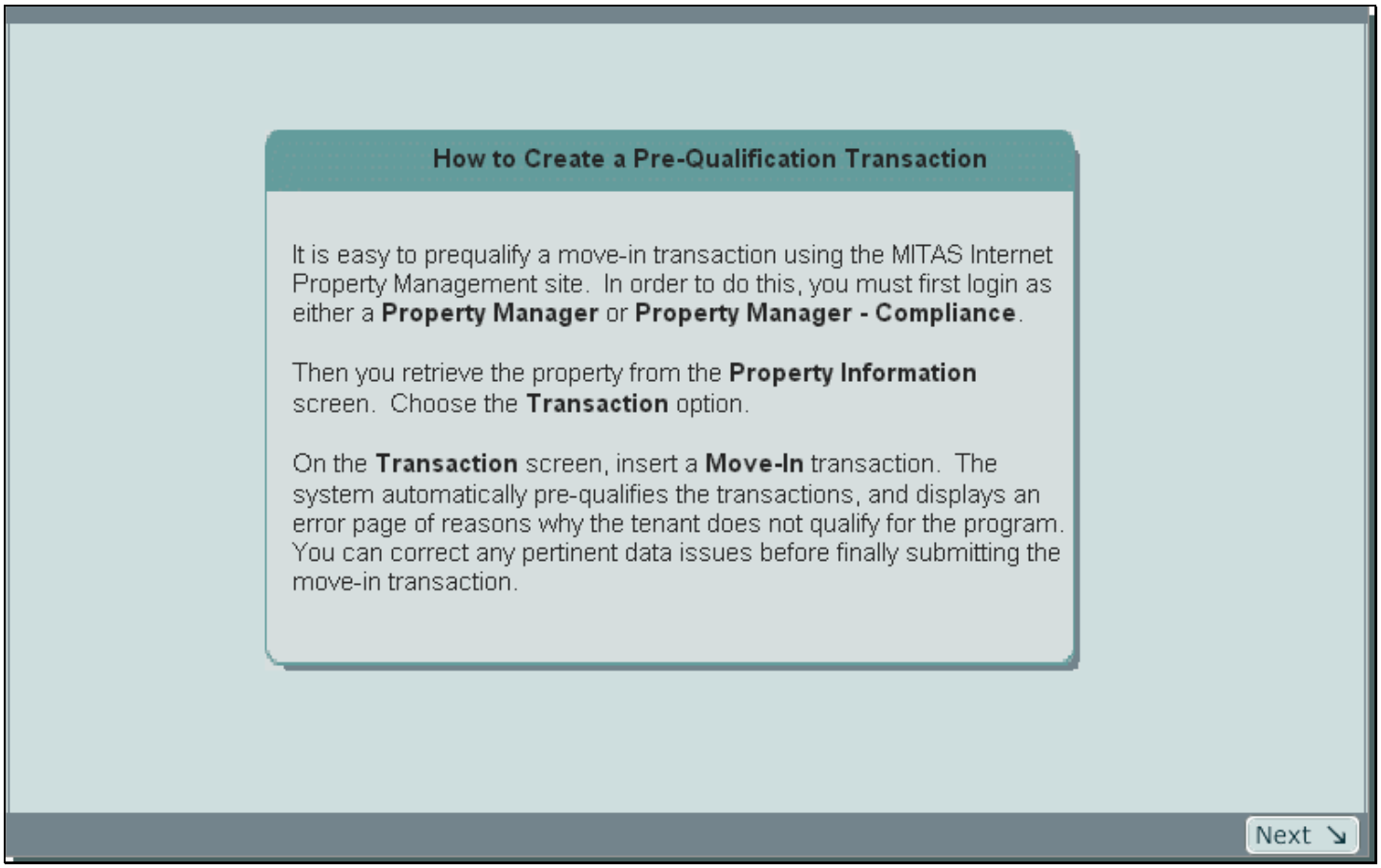
The pre-qualification process gives you a list of errors why this tenant does not qualify for the program. You can correct any pertinent data errors before submitting the transaction as a move-in.

Pre-qualification transactions in the system are not considered move-in transactions until you submit them as a move-in. Pre-qualification transactions can remain in the system indefinitely without altering your compliance status.

If you have previously pre-qualified a move-in, and did not submit the move-in transaction at the time, you should pre-qualify again before submitting the move-in. Pre-qualification is only valid at the time the pre-qualification process is run.

Notes

Slide 5 - Concept



Text Captions

How to Create a Pre-Qualification Transaction

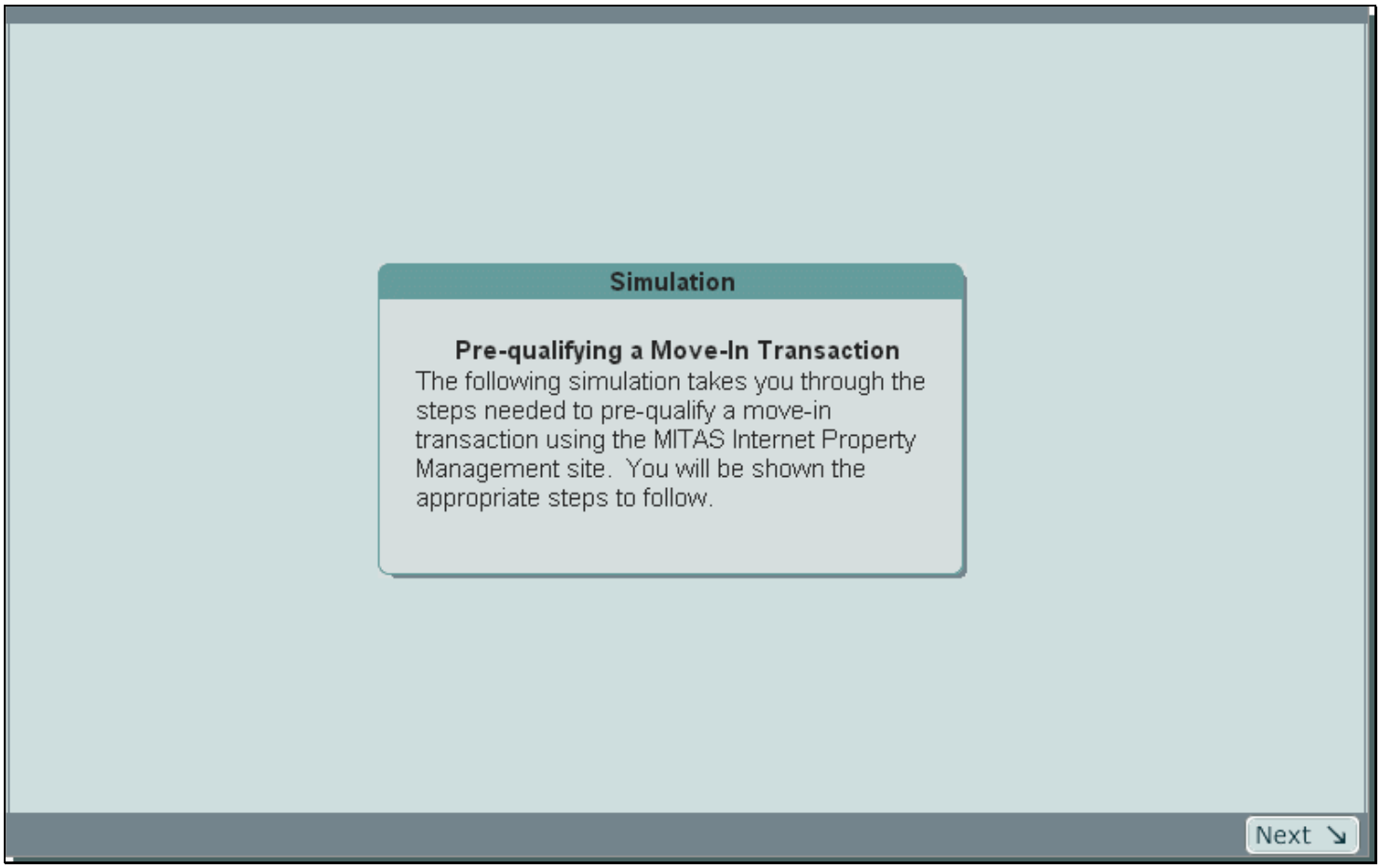
It is easy to prequalify a move-in transaction using the MITAS Internet Property Management site. In order to do this, you must first login as either a **Property Manager** or **Property Manager - Compliance**.

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

On the **Transaction** screen, insert a **Move-In** transaction. The system automatically pre-qualifies the transactions, and displays an error page of reasons why the tenant does not qualify for the program. You can correct any pertinent data issues before finally submitting the move-in transaction.

Notes

Slide 6 - Simulation



Text Captions

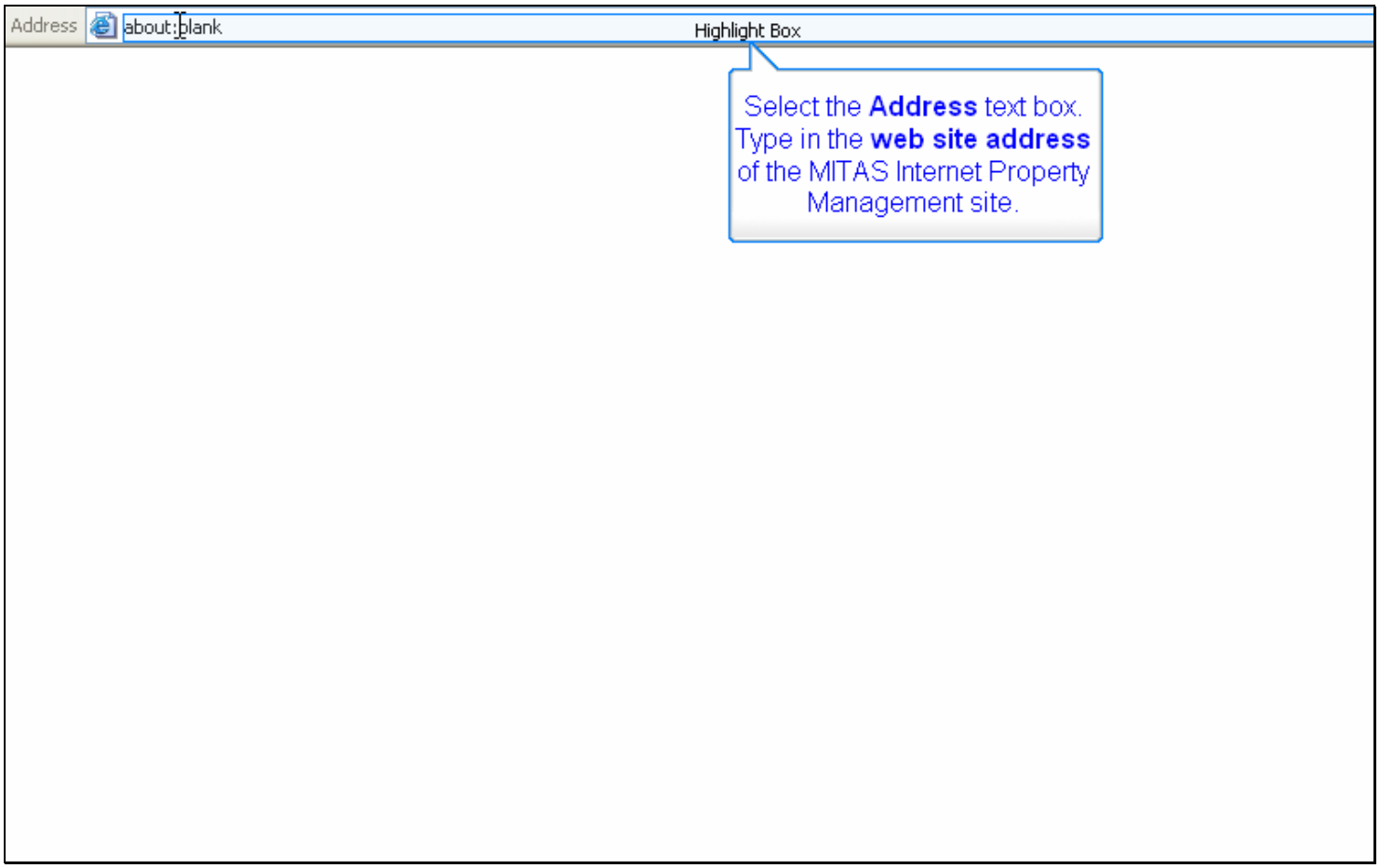
Simulation

Pre-qualifying a Move-In Transaction

The following simulation takes you through the steps needed to pre-qualify a move-in transaction using the MITAS Internet Property Management site. You will be shown the appropriate steps to follow.

Notes

Slide 7 - Slide 7

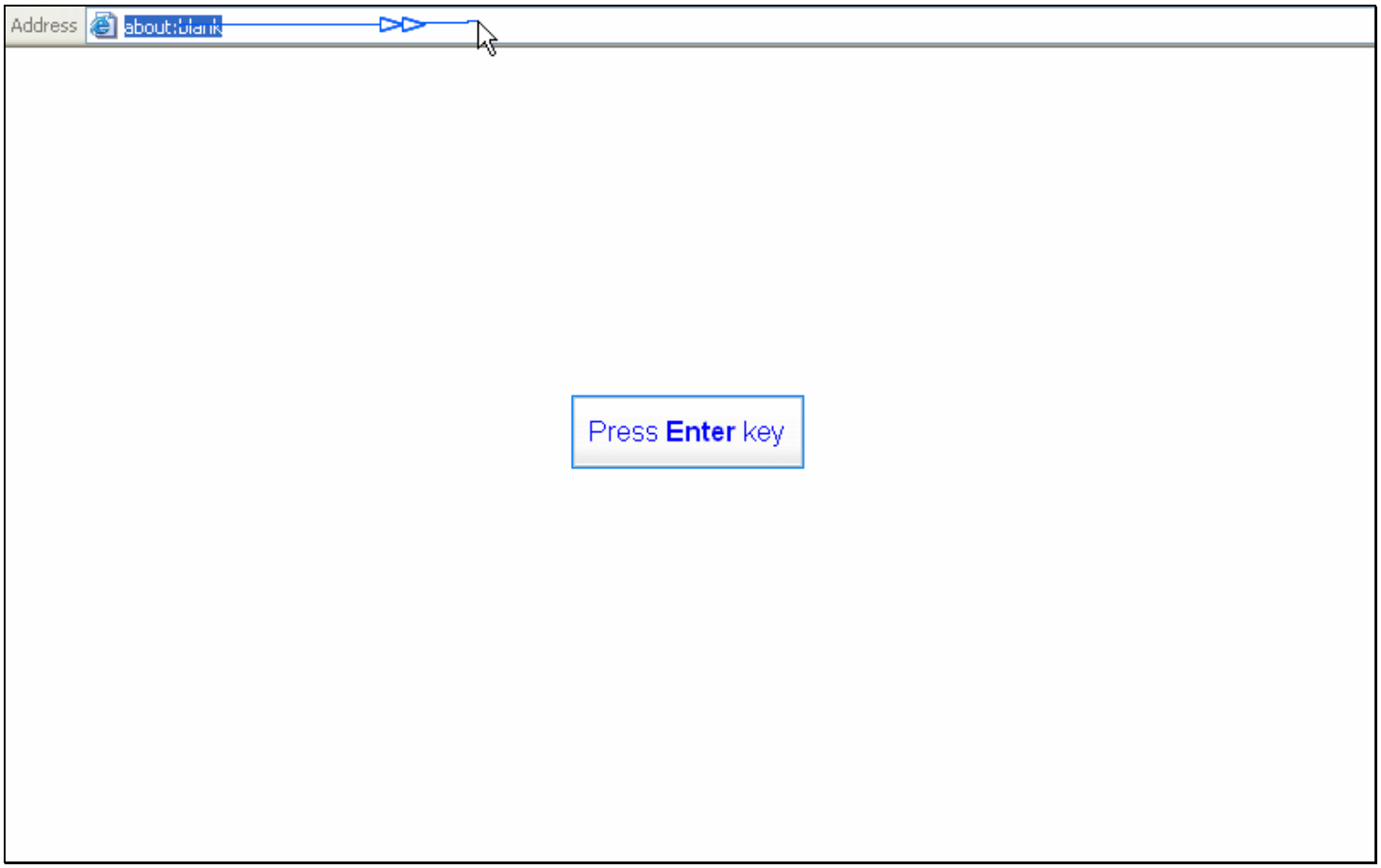


Text Captions

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

Notes

Slide 8 - Slide 8

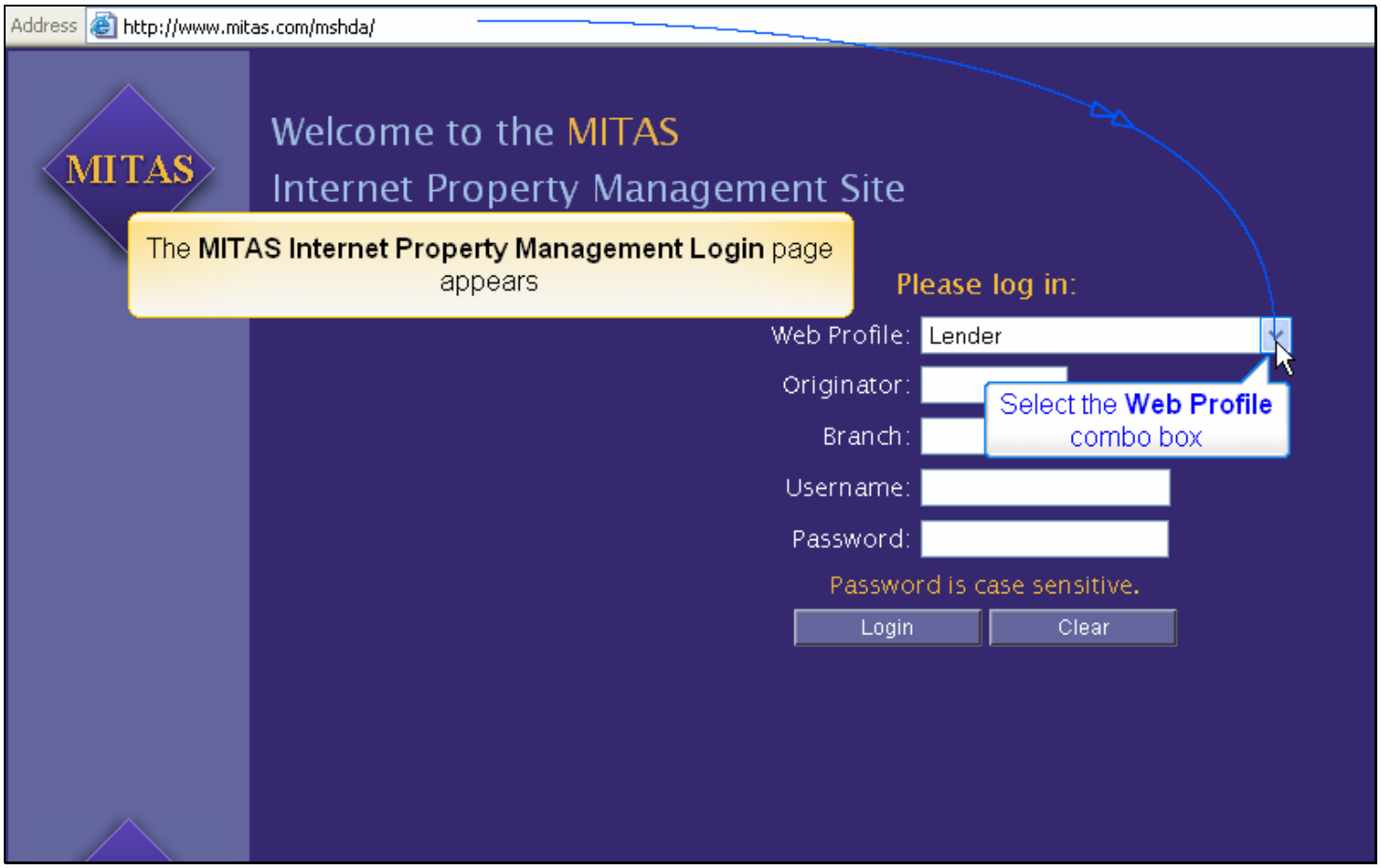


Text Captions

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

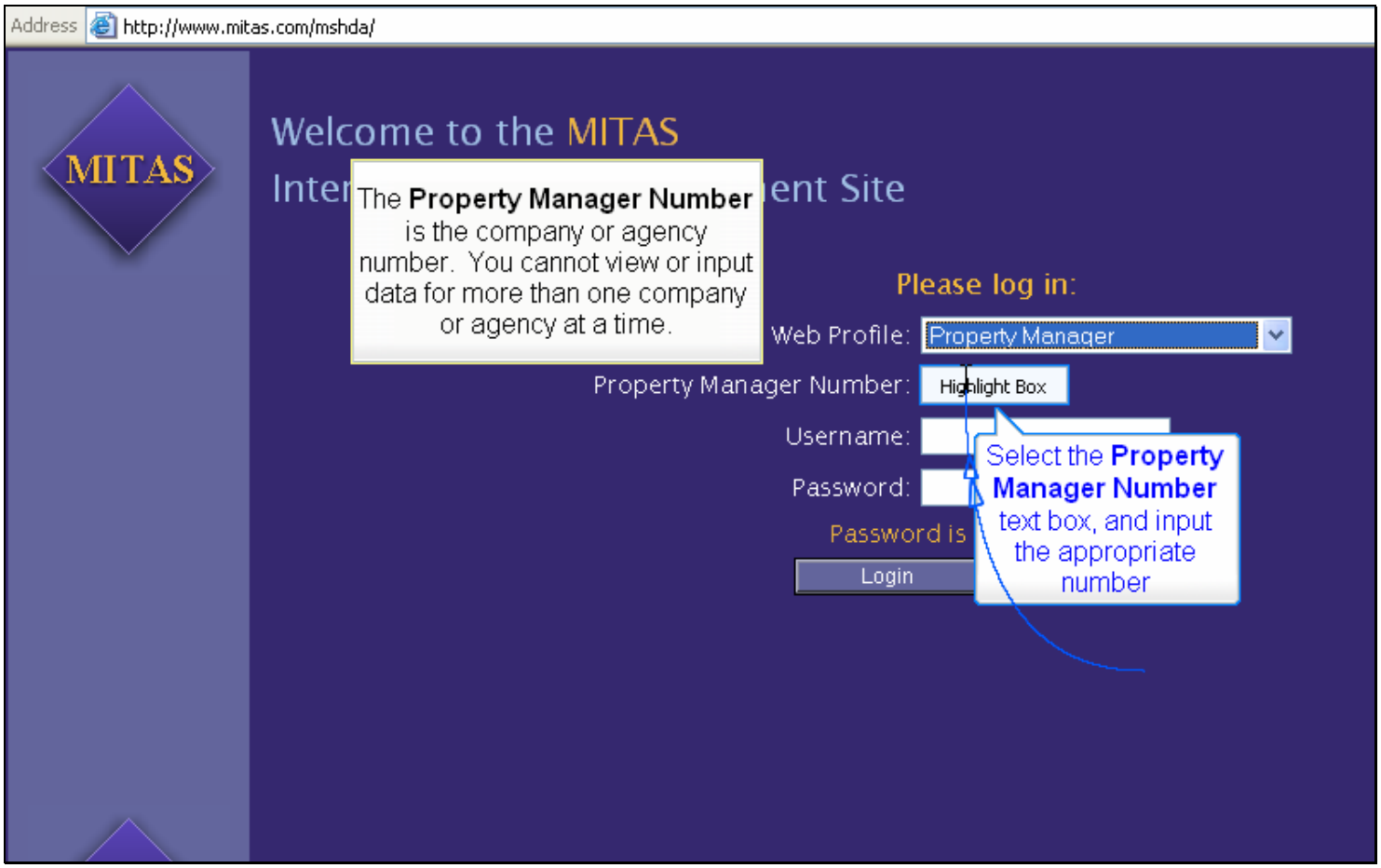
Text Captions

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



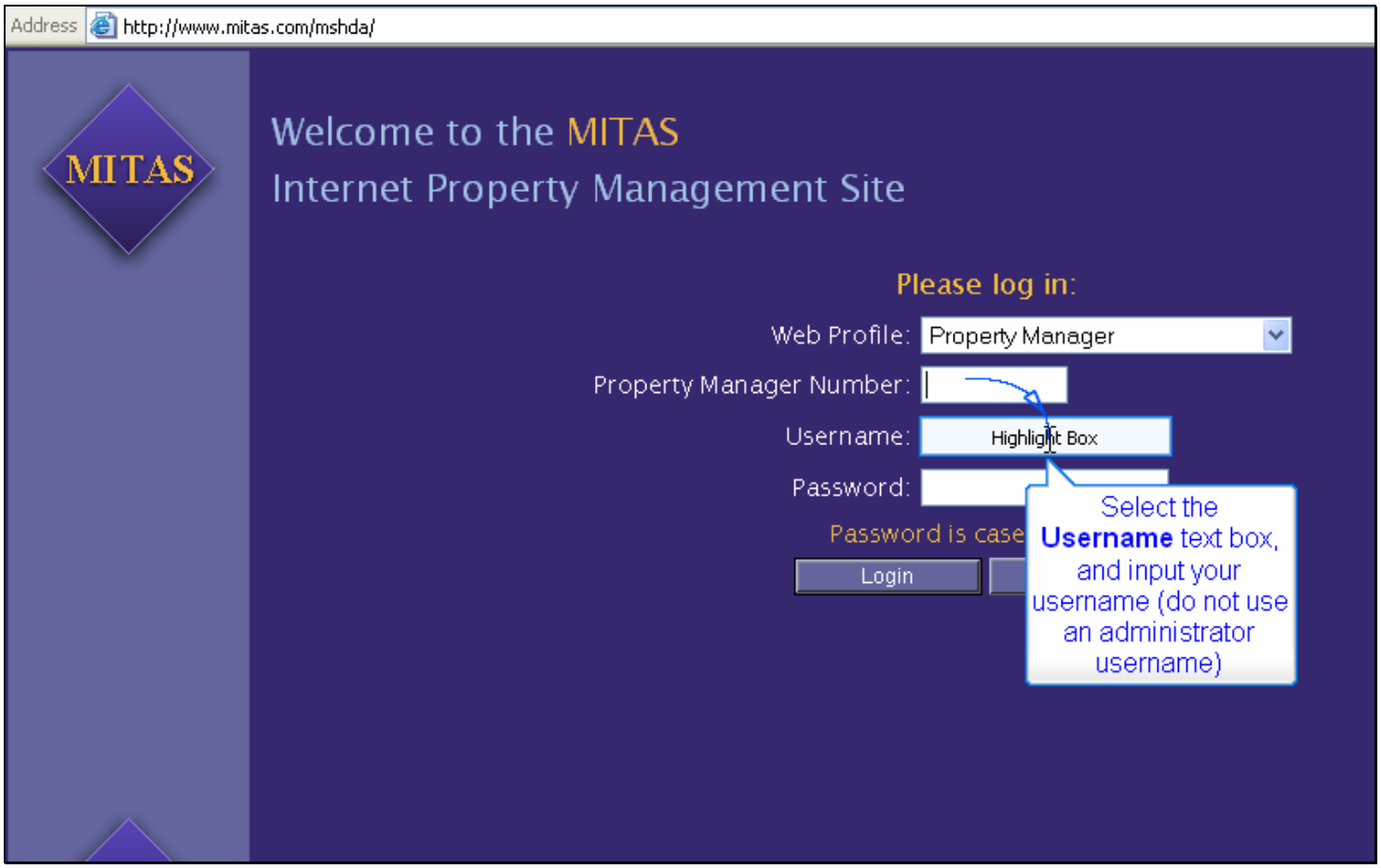
Text Captions

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

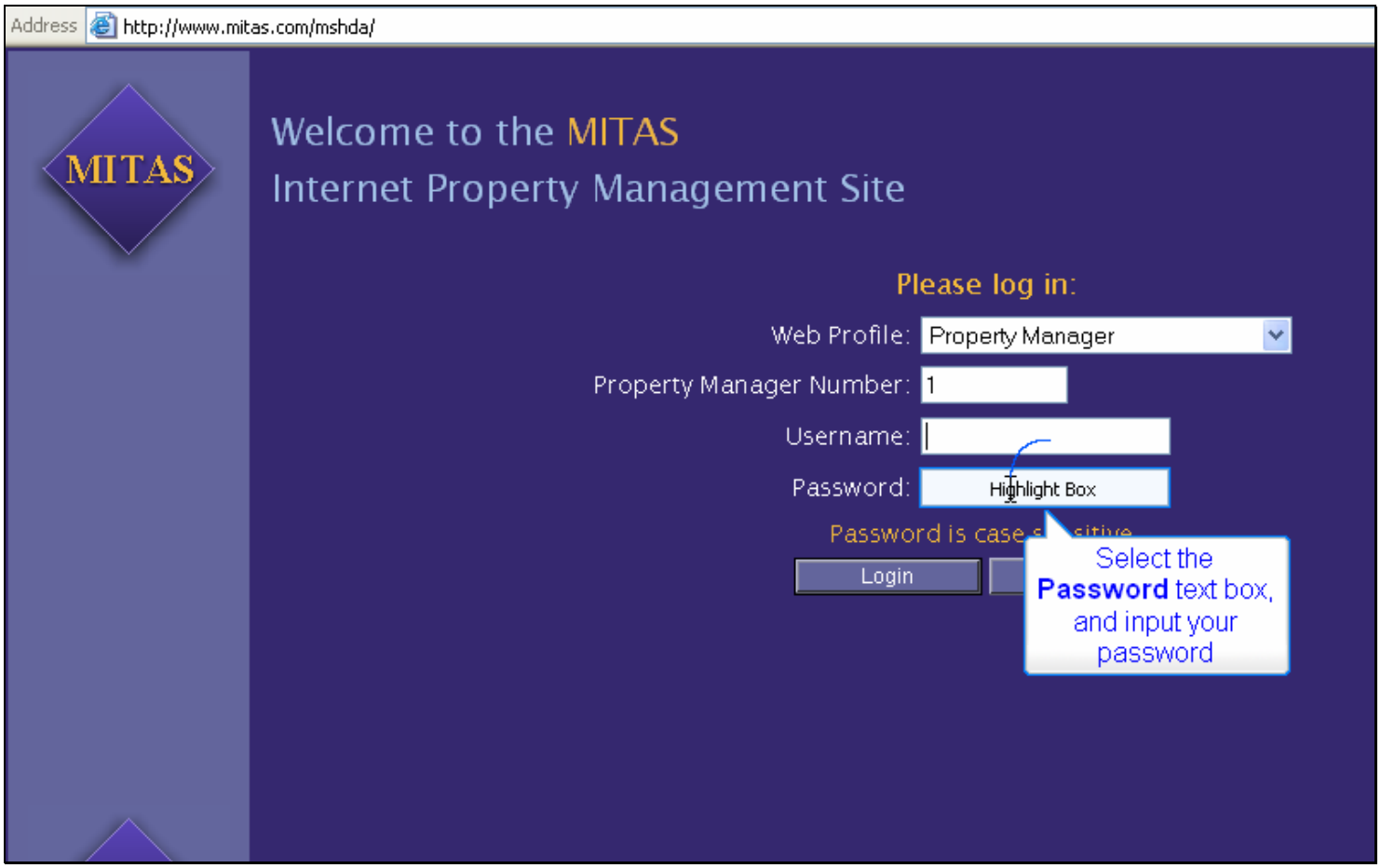


Text Captions

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

Notes

Slide 14 - Slide 14

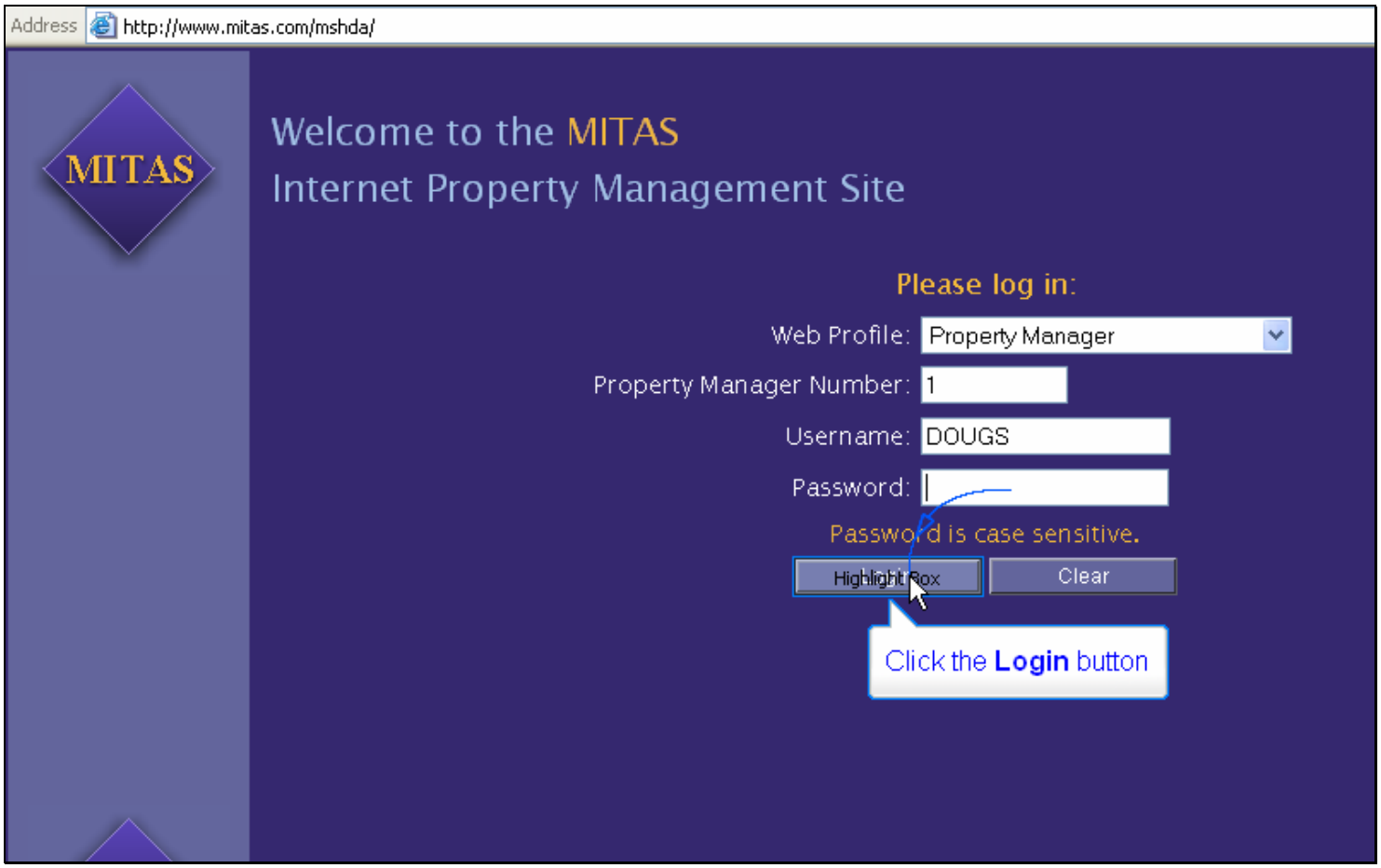


Text Captions

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

Notes

Slide 15 - Slide 15

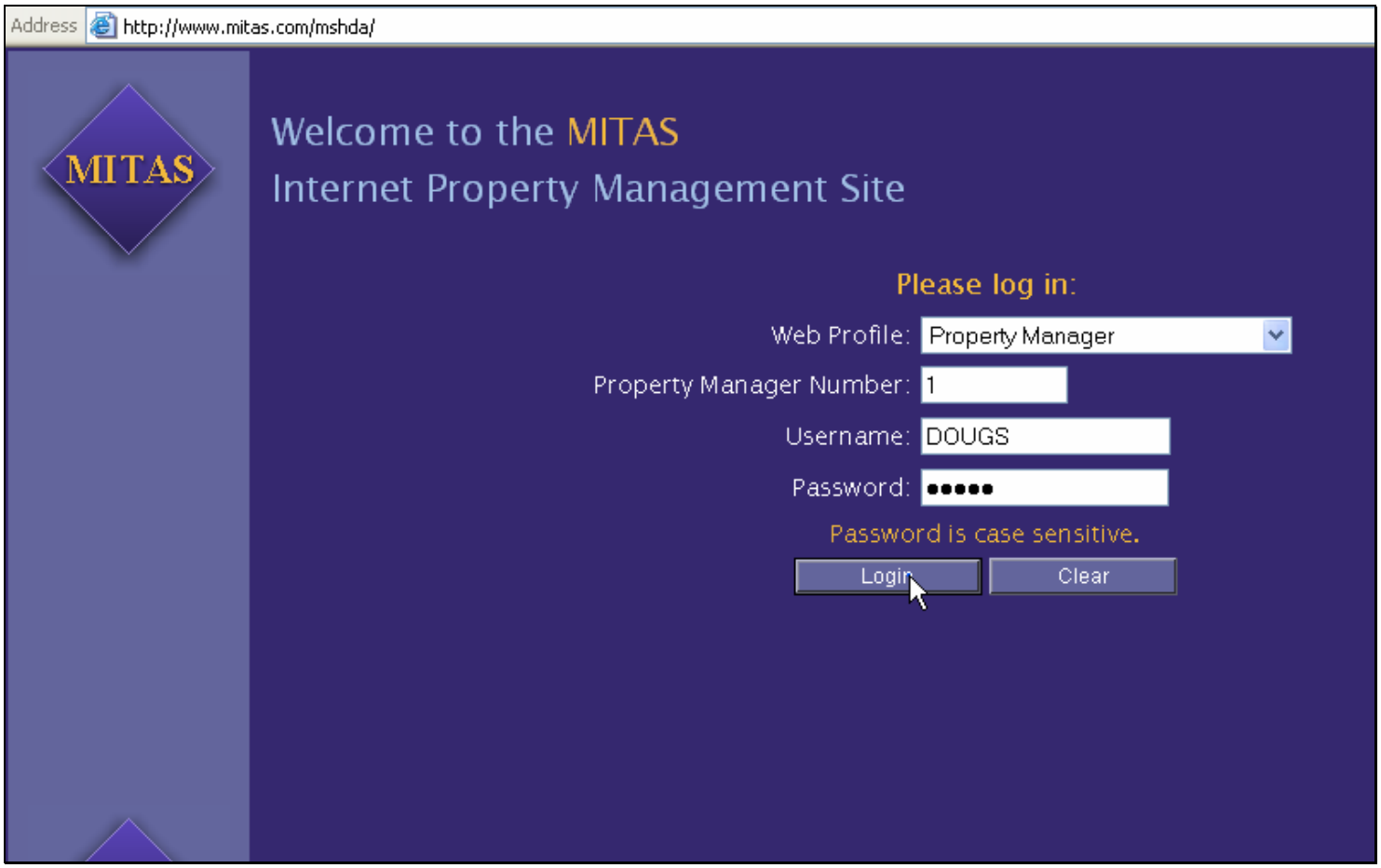


Text Captions

Click the **Login** button

Notes

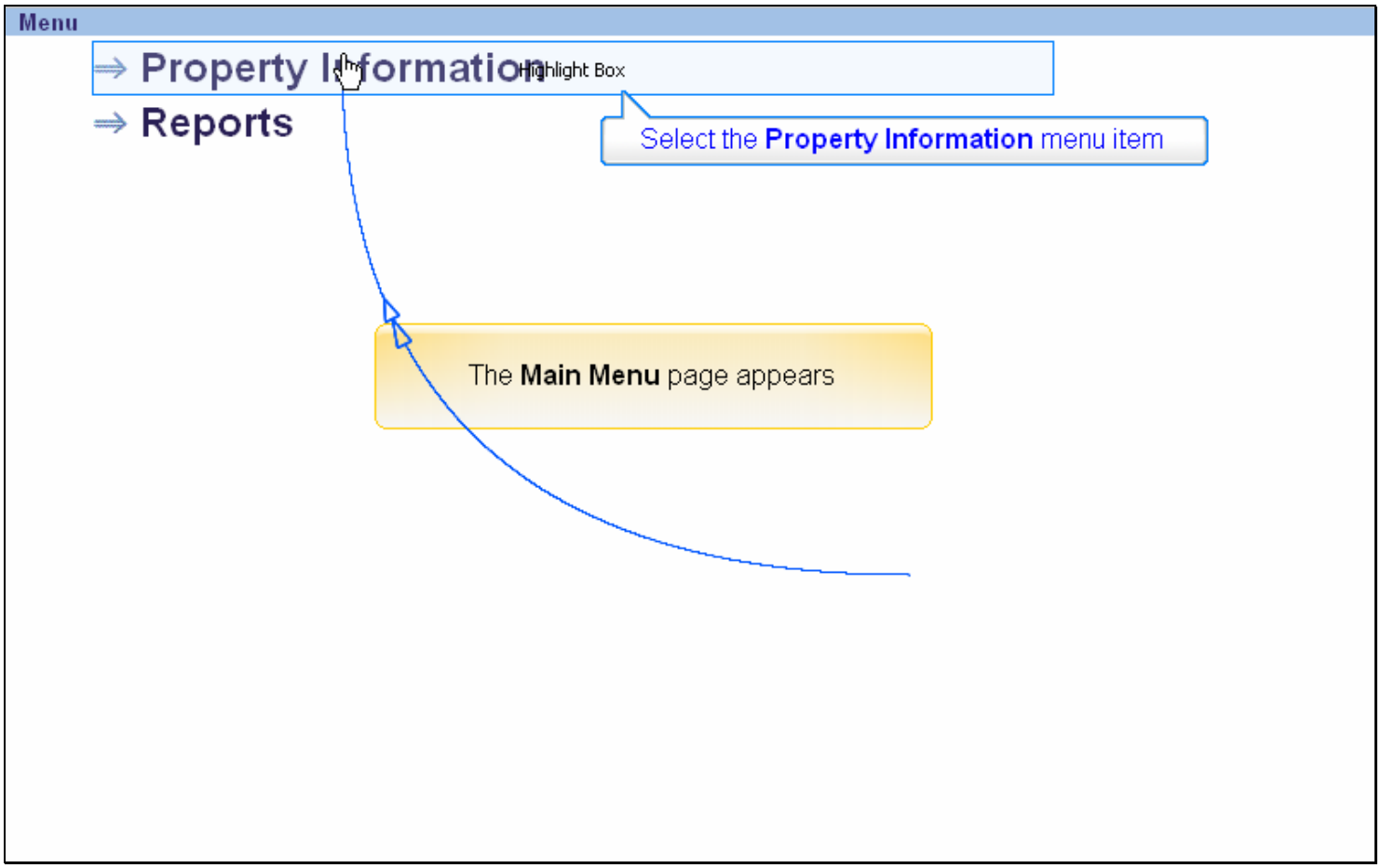
Slide 16 - Slide 16



Text Captions

Notes

Slide 17 - Slide 17



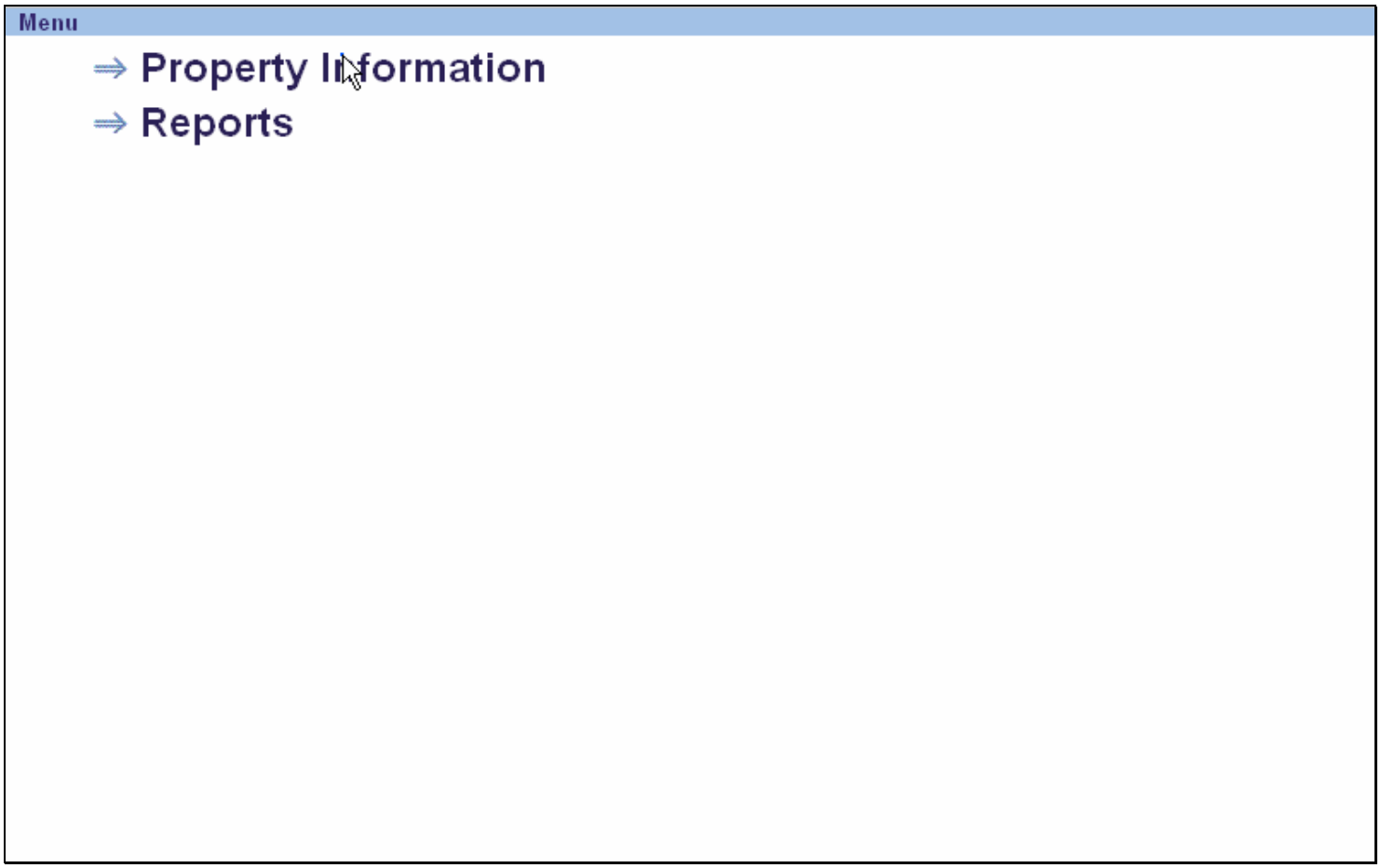
Text Captions

The **Main Menu** page appears

Select the **Property Information** menu item

Notes

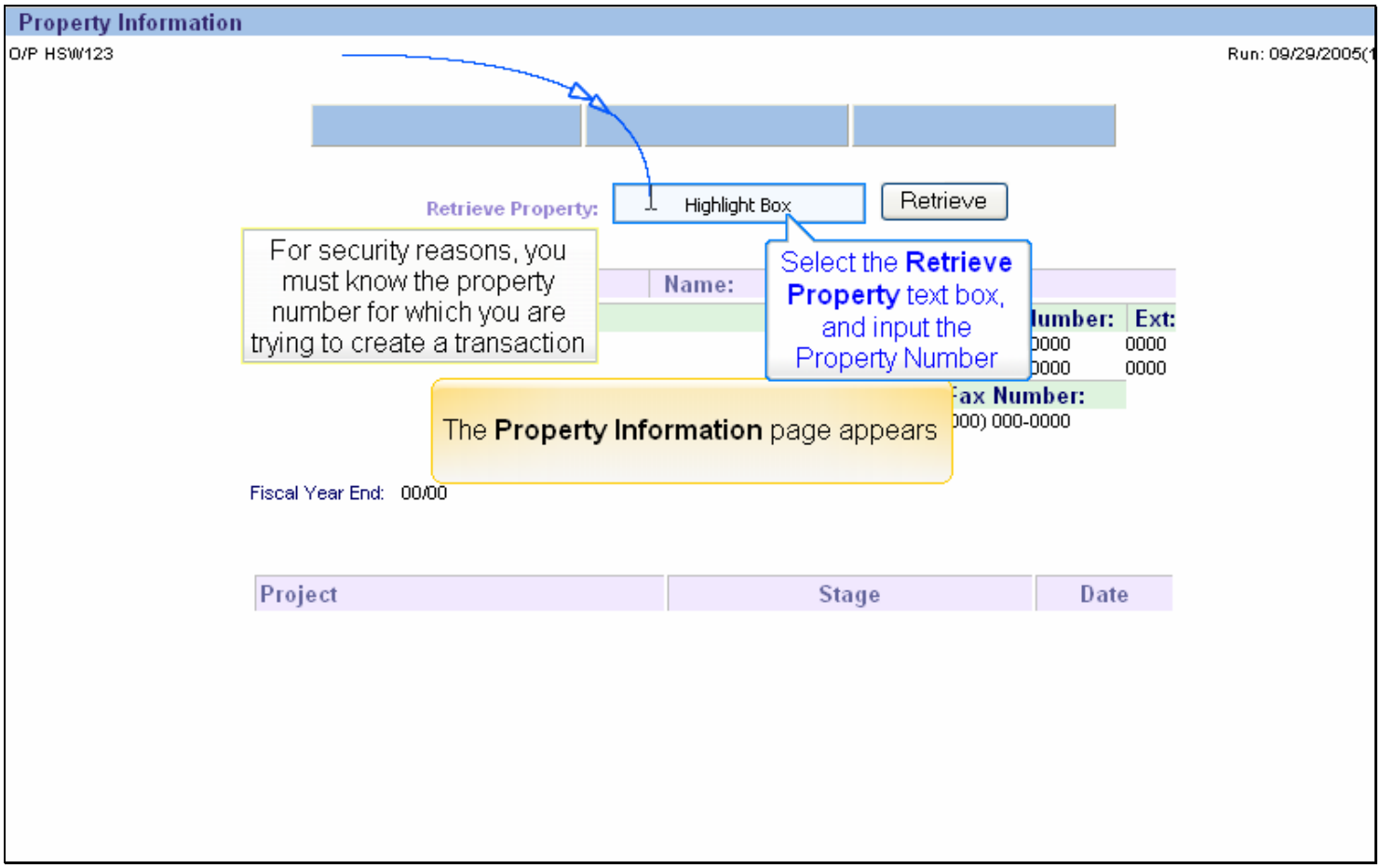
Slide 18 - Slide 18



Text Captions

Notes

Slide 19 - Slide 19



Text Captions

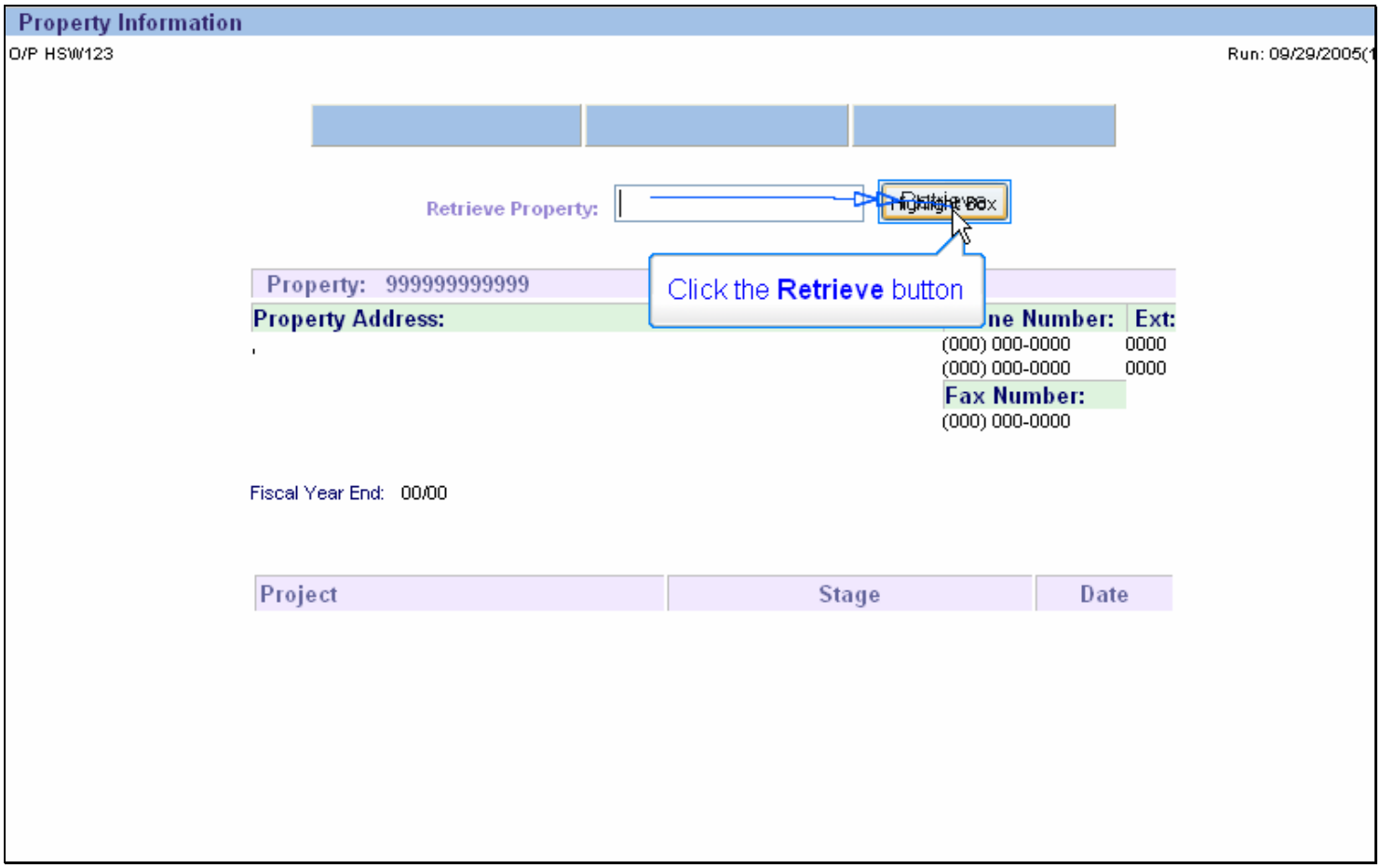
The **Property Information** page appears

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

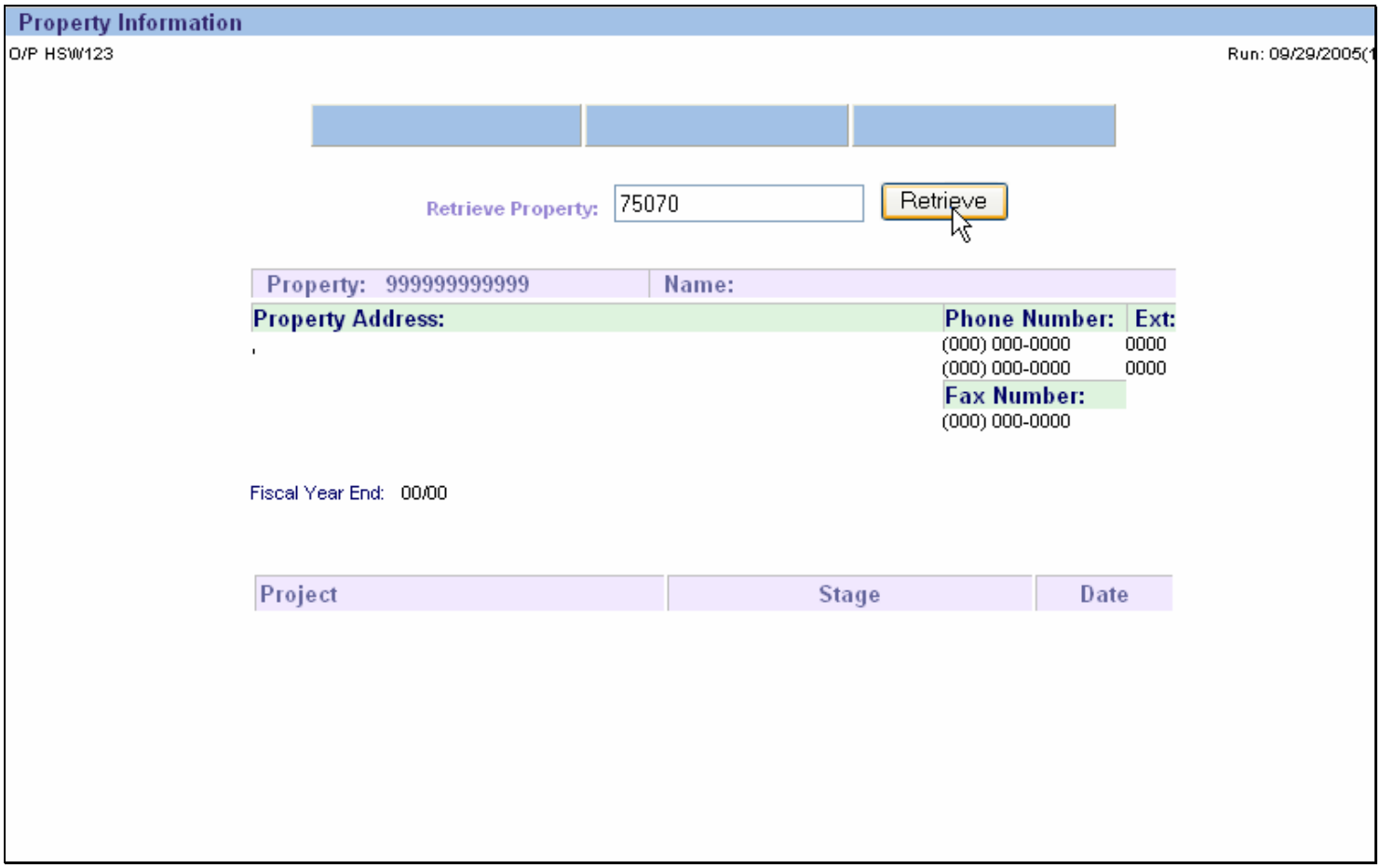


Text Captions

Click the **Retrieve** button

Notes

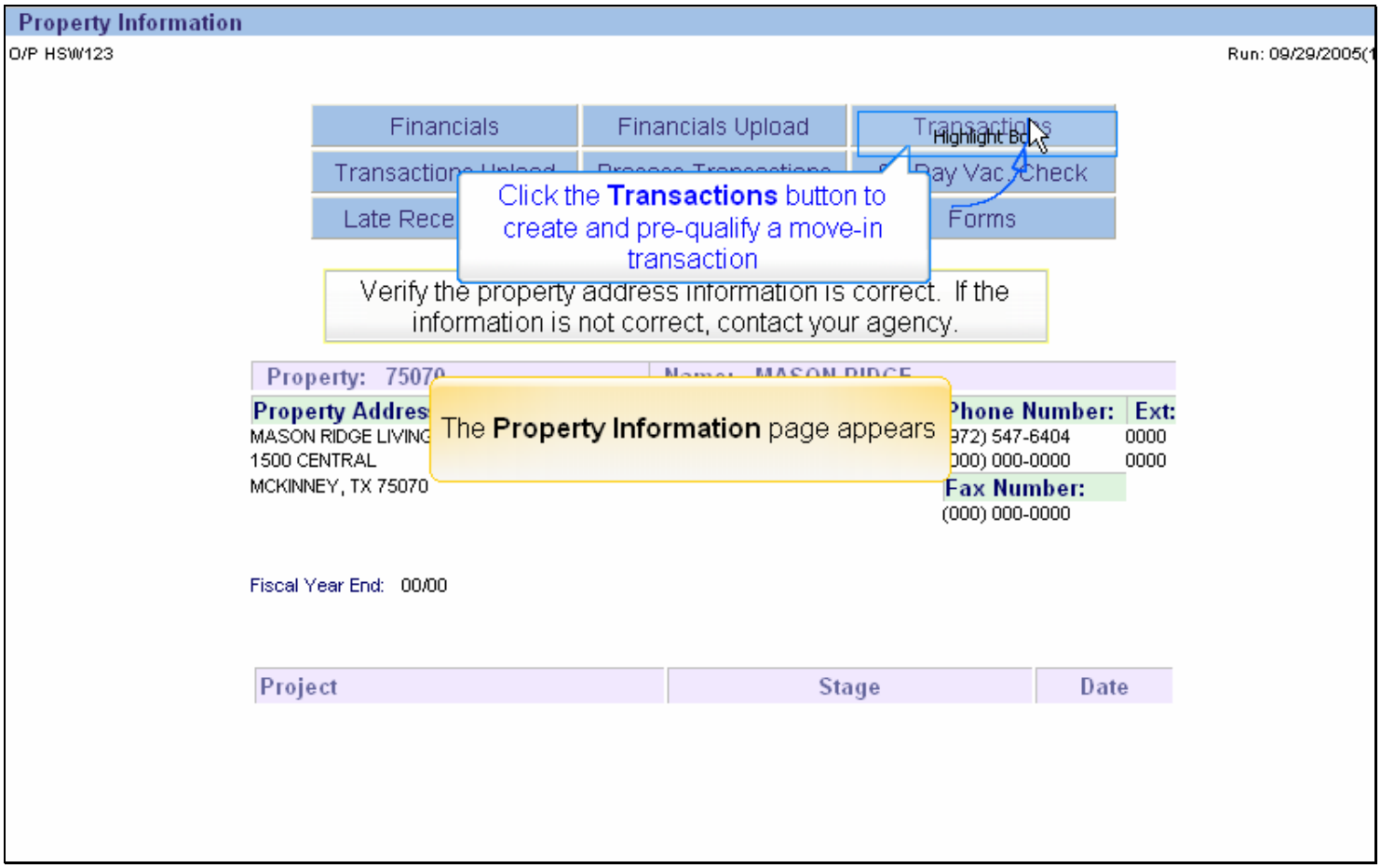
Slide 21 - Slide 21



Text Captions

Notes

Slide 22 - Slide 22



Text Captions

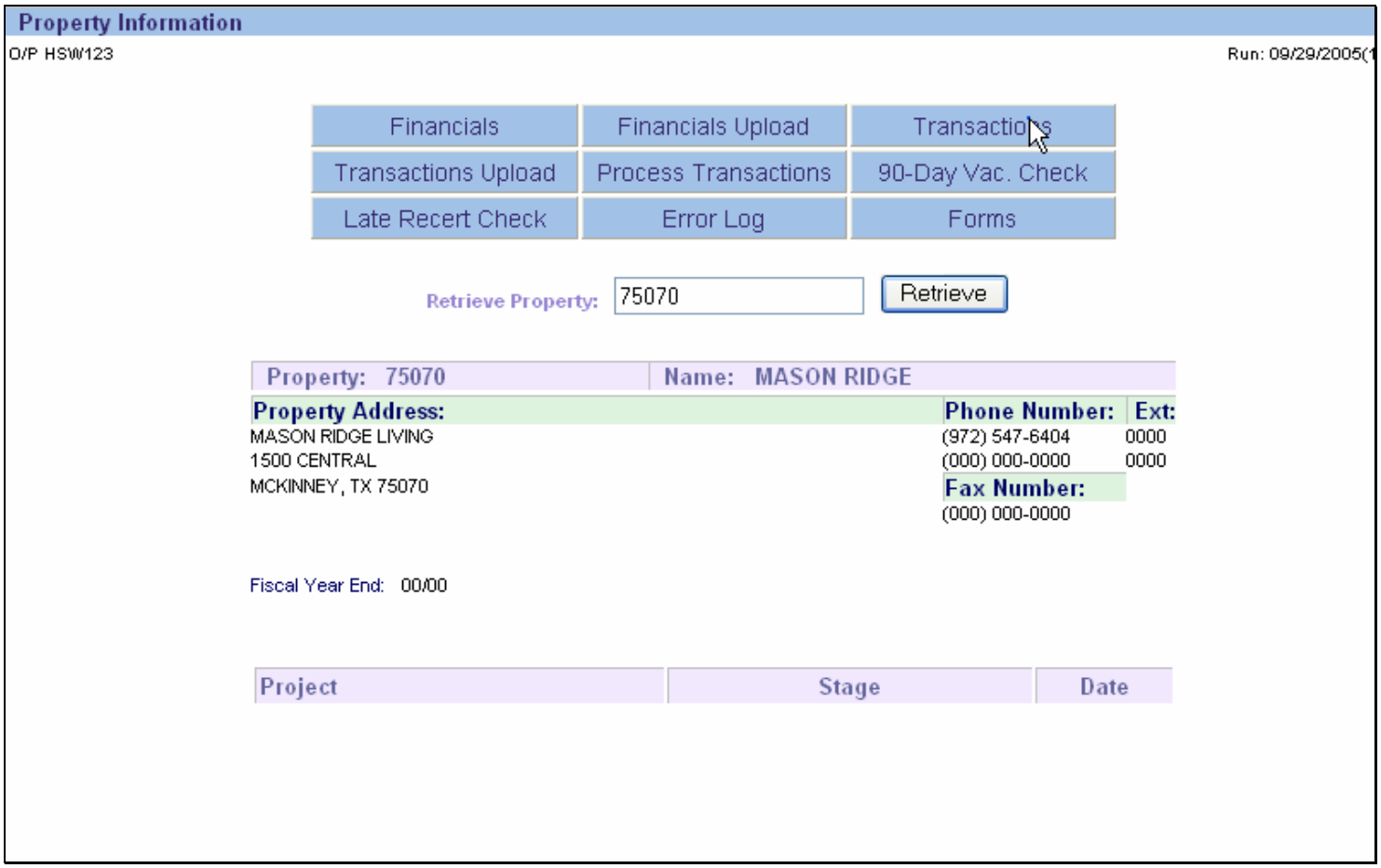
The **Property Information** page appears

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

Click the **Transactions** button to create and pre-qualify a move-in transaction

Notes

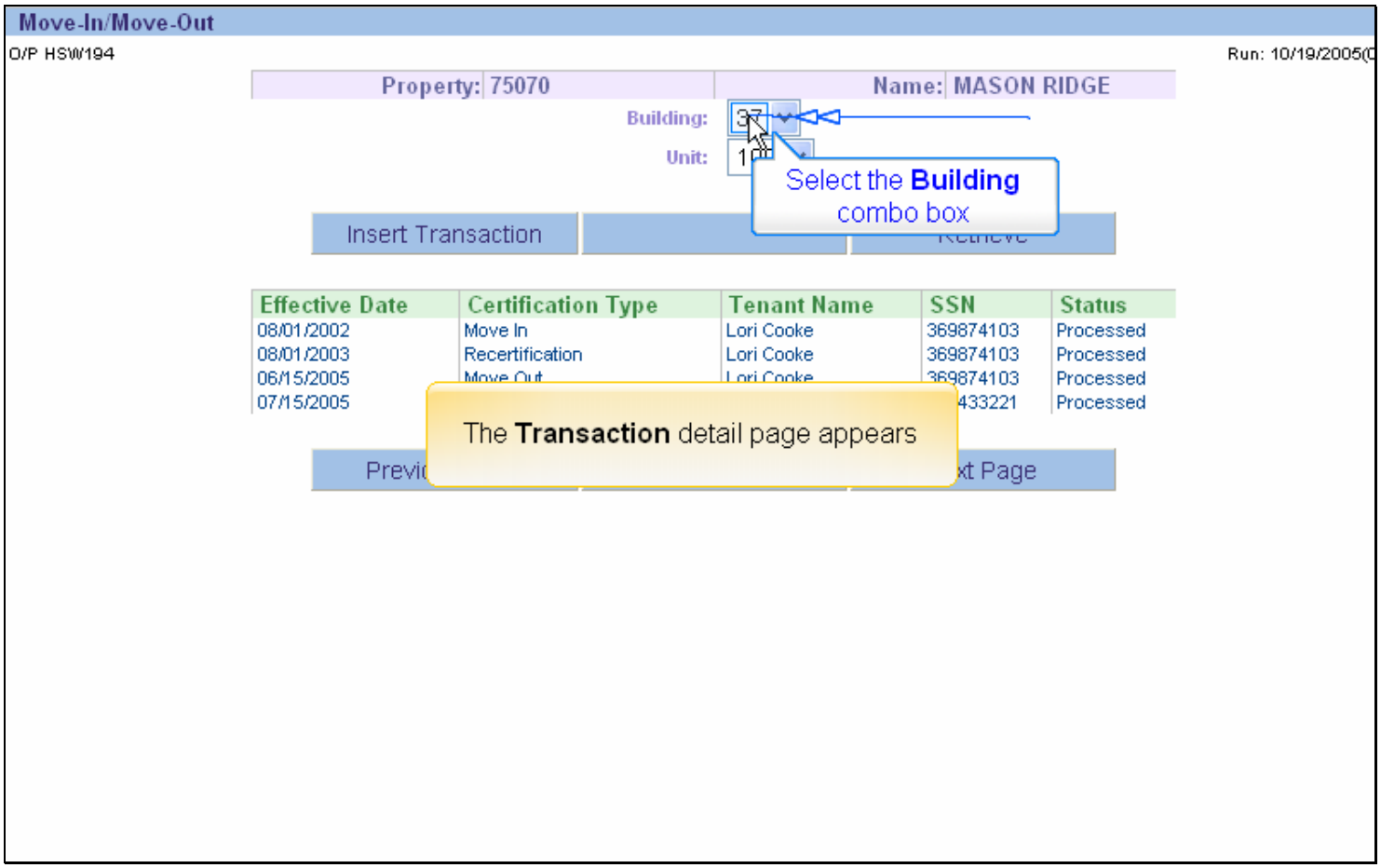
Slide 23 - Slide 23



Text Captions

Notes

Slide 24 - Slide 24



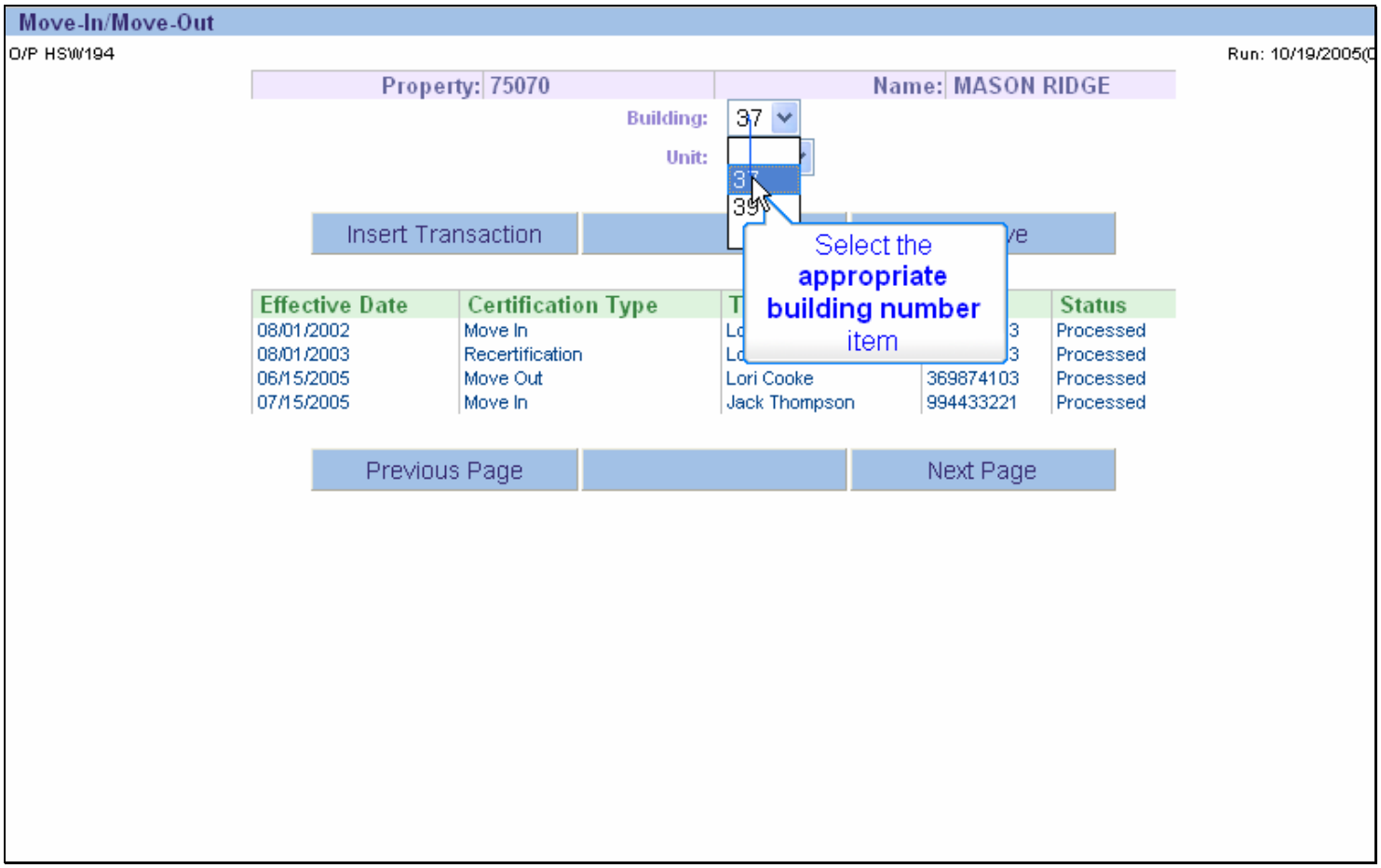
Text Captions

The **Transaction** detail page appears

Select the **Building** combo box

Notes

Slide 25 - Slide 25

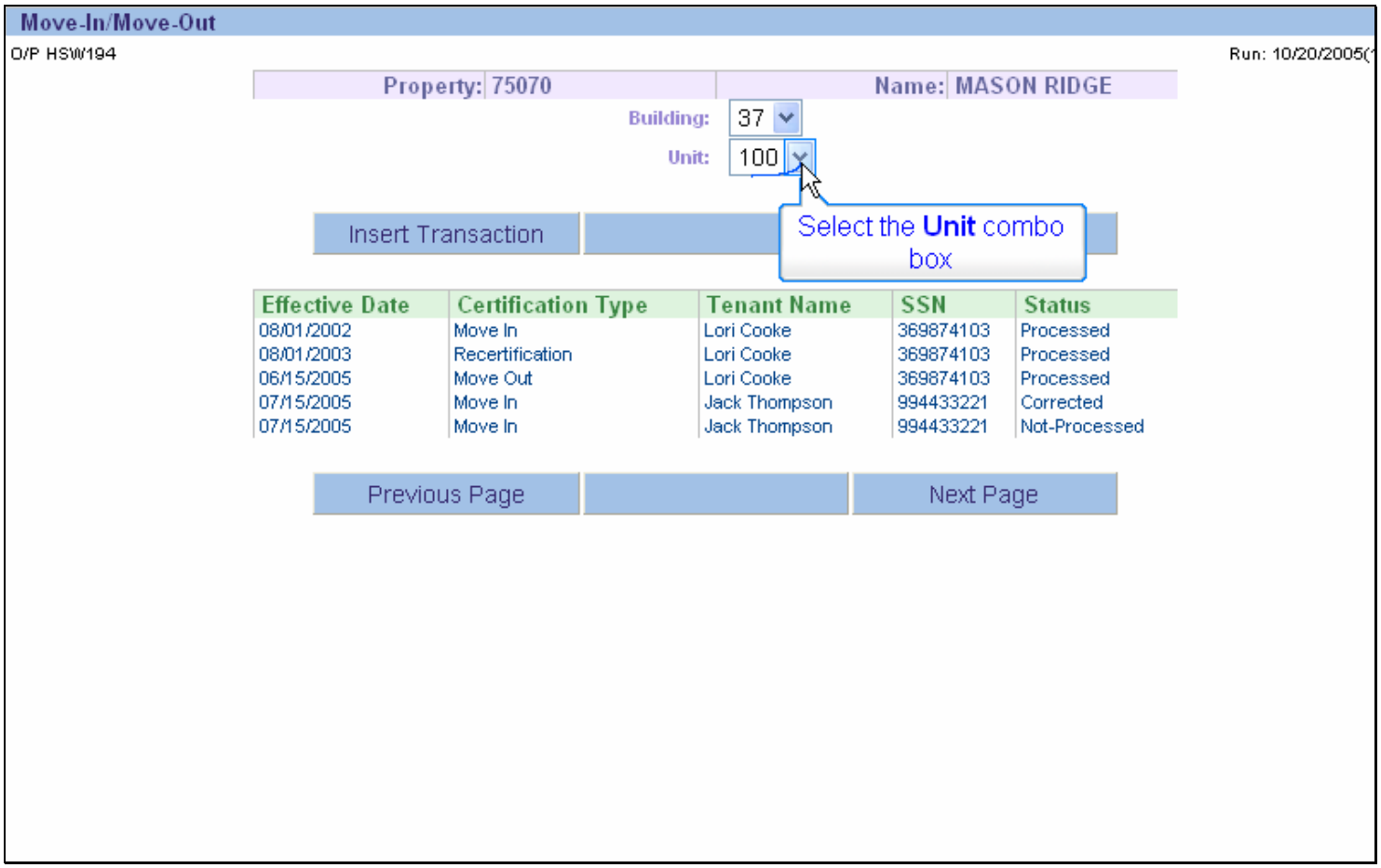


Text Captions

Select the **appropriate building number** item

Notes

Slide 26 - Slide 26

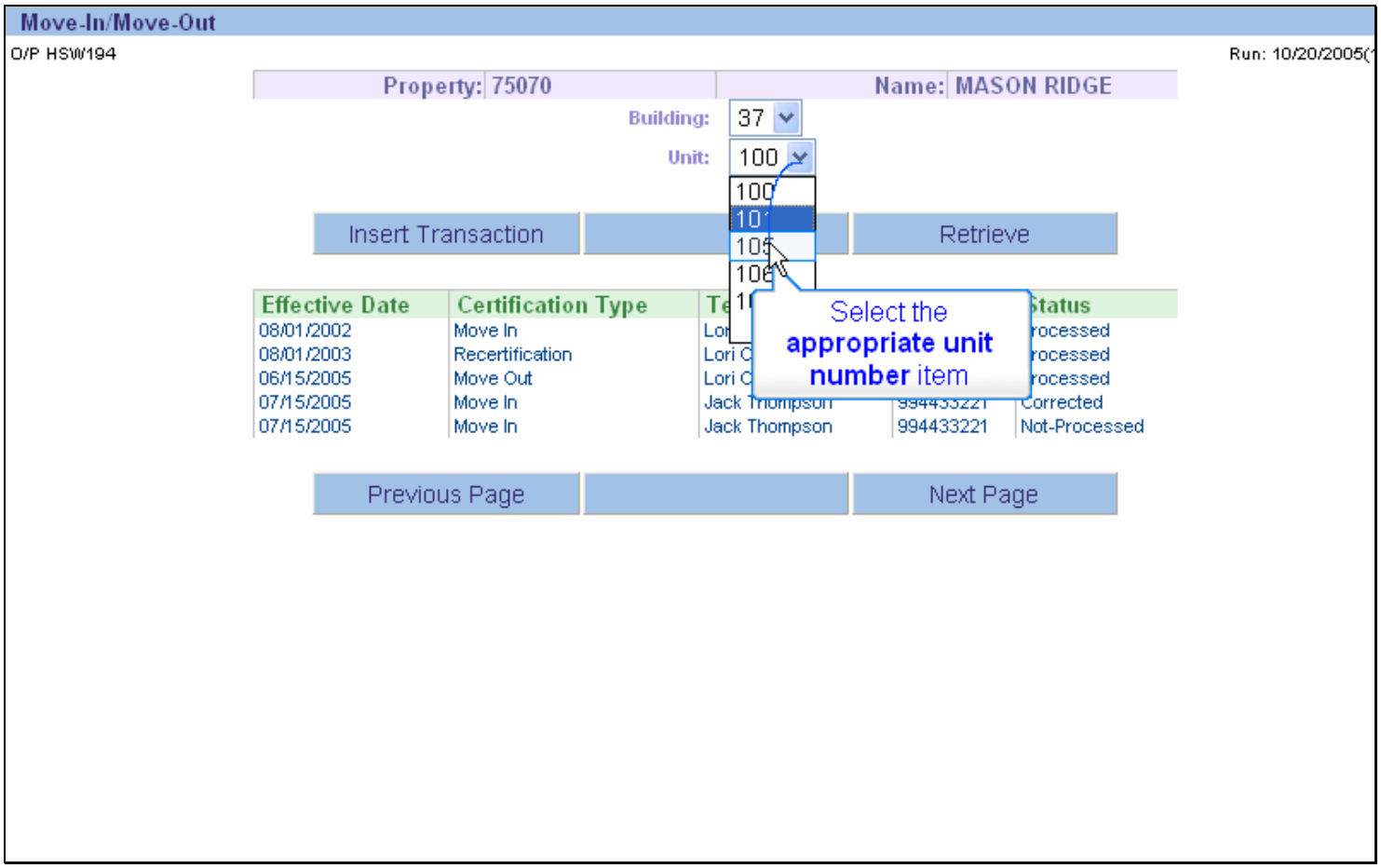


Text Captions

Select the **Unit** combo box

Notes

Slide 27 - Slide 27

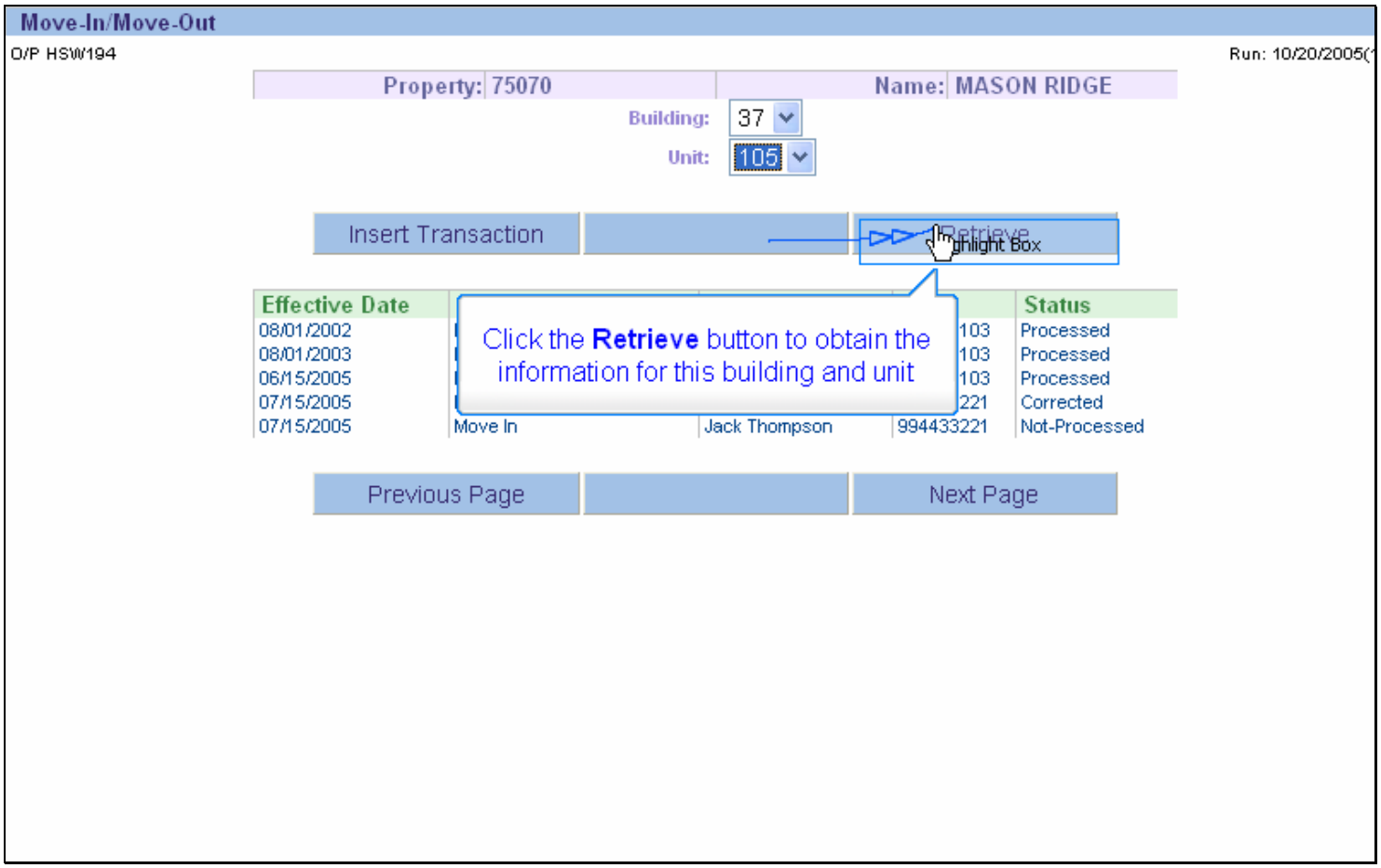


Text Captions

Select the **appropriate unit number** item

Notes

Slide 28 - Slide 28

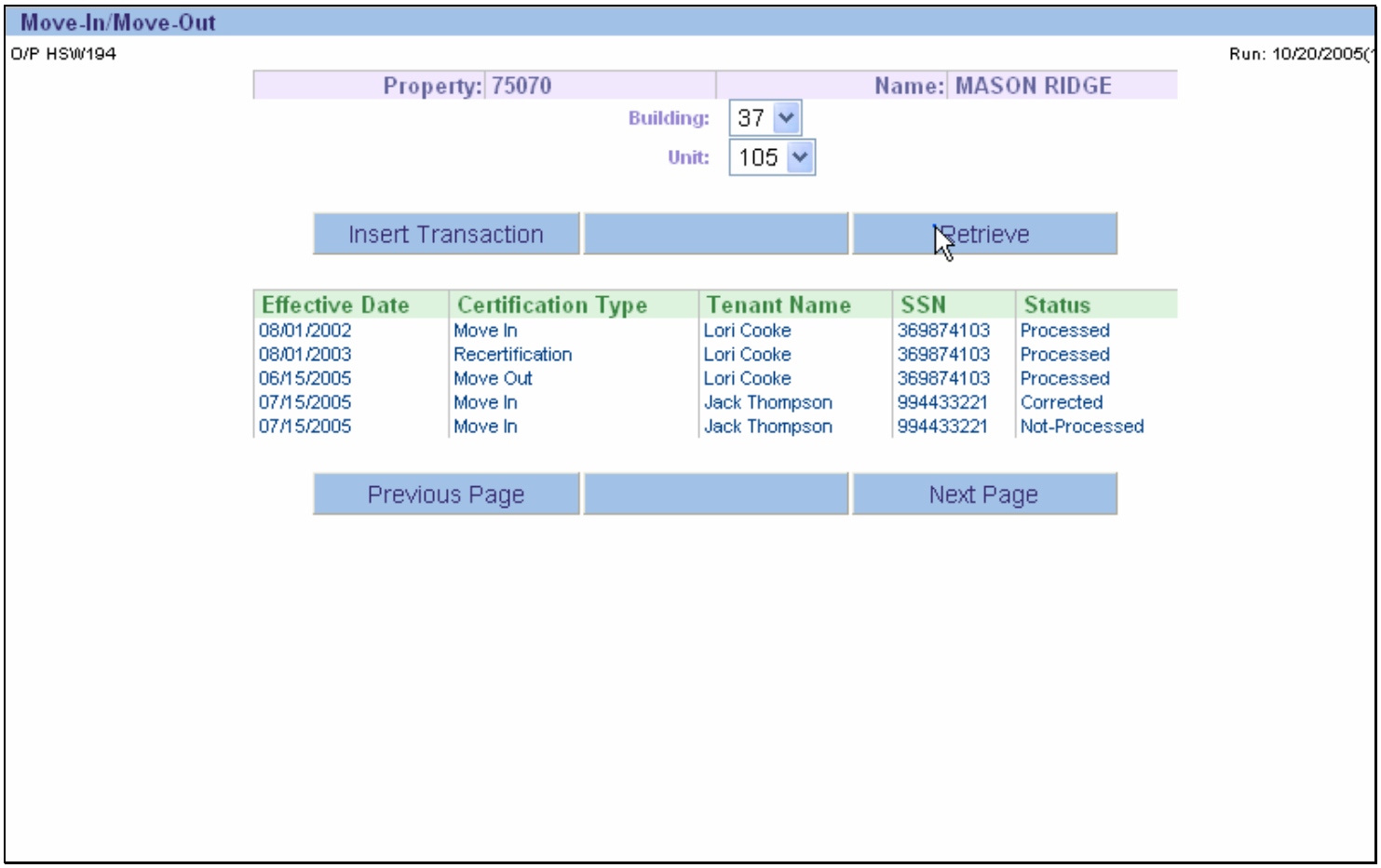


Text Captions

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

Notes

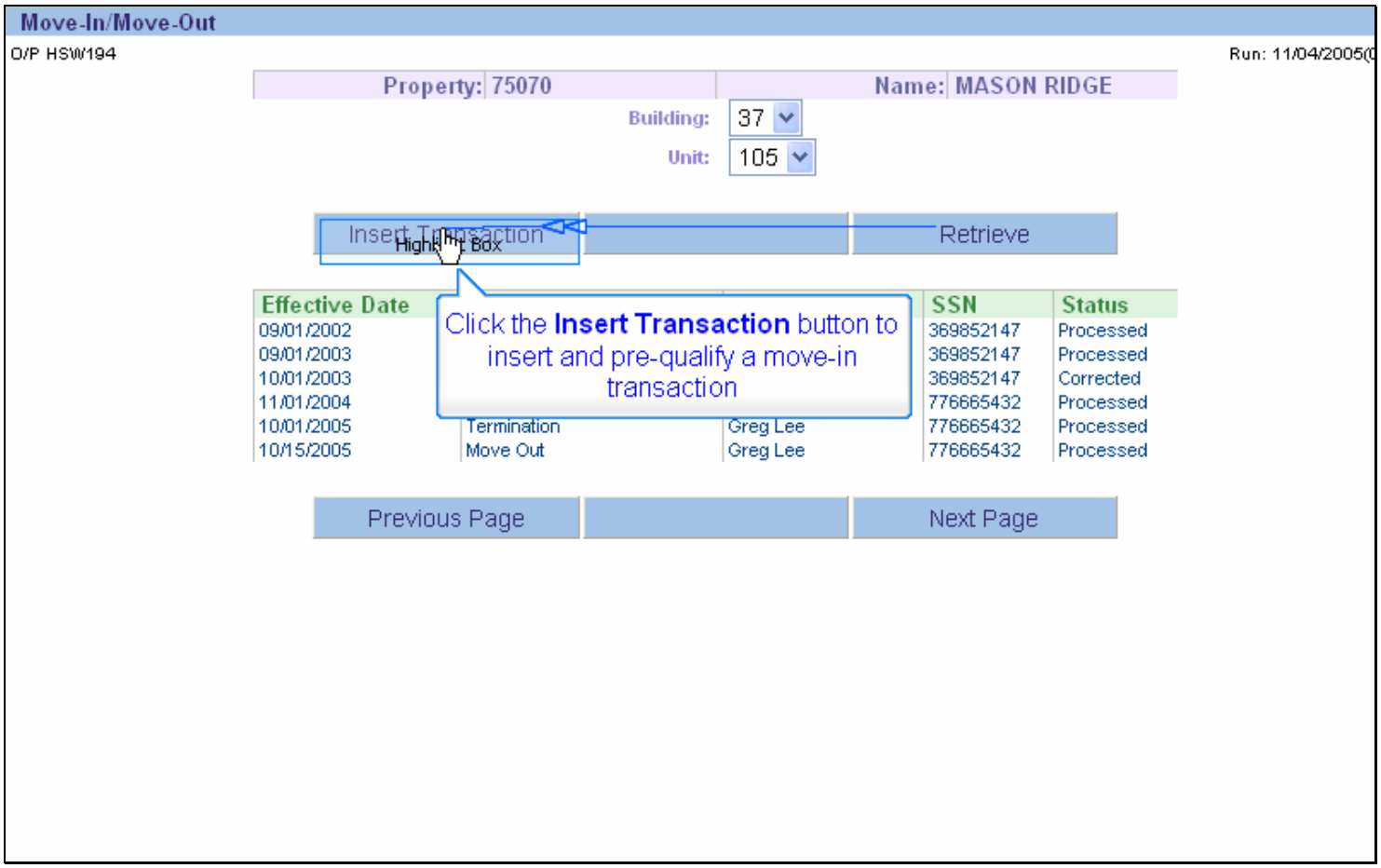
Slide 29 - Slide 29



Text Captions

Notes

Slide 30 - Slide 30

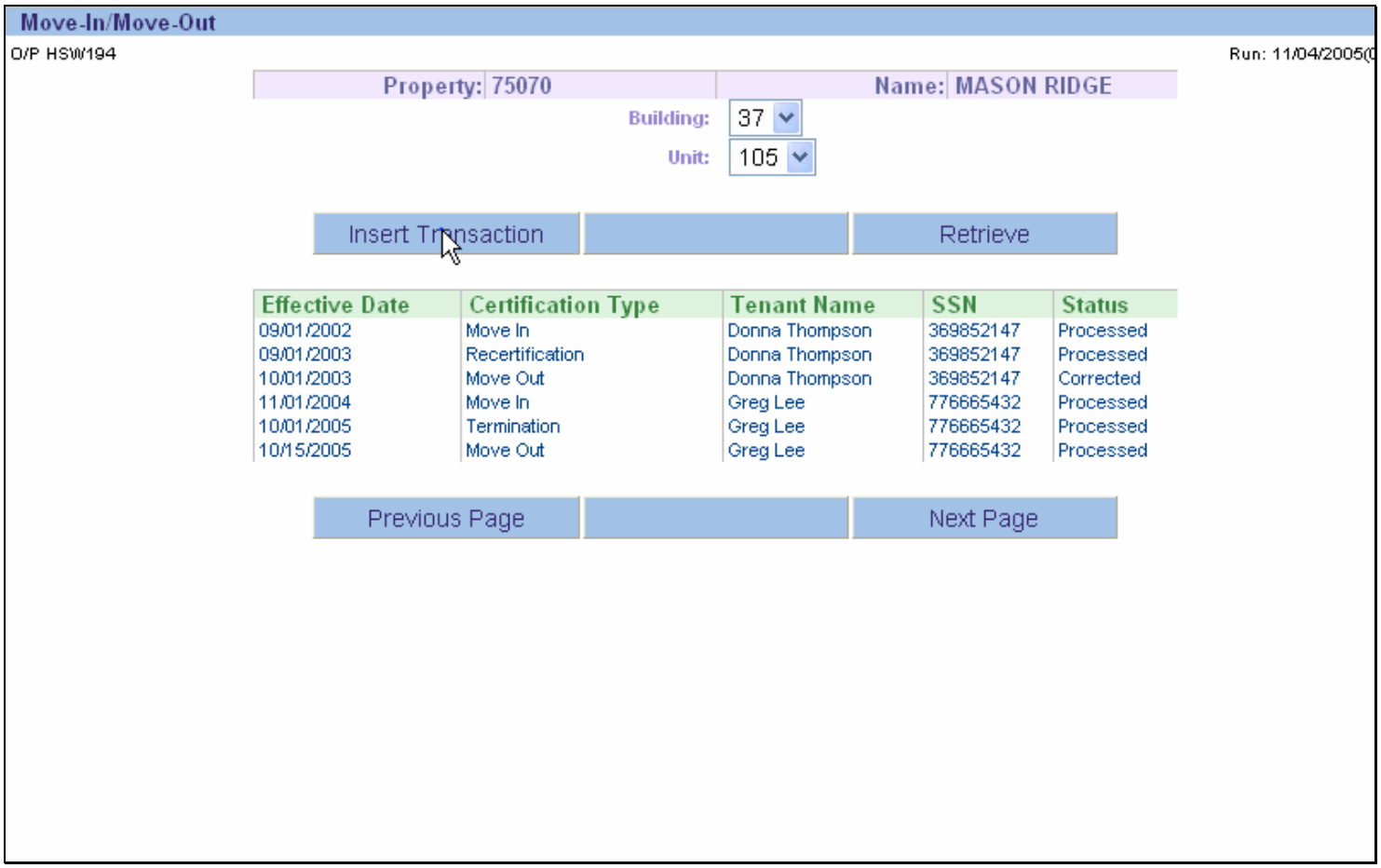


Text Captions

Click the **Insert Transaction** button to insert and pre-qualify a move-in transaction

Notes

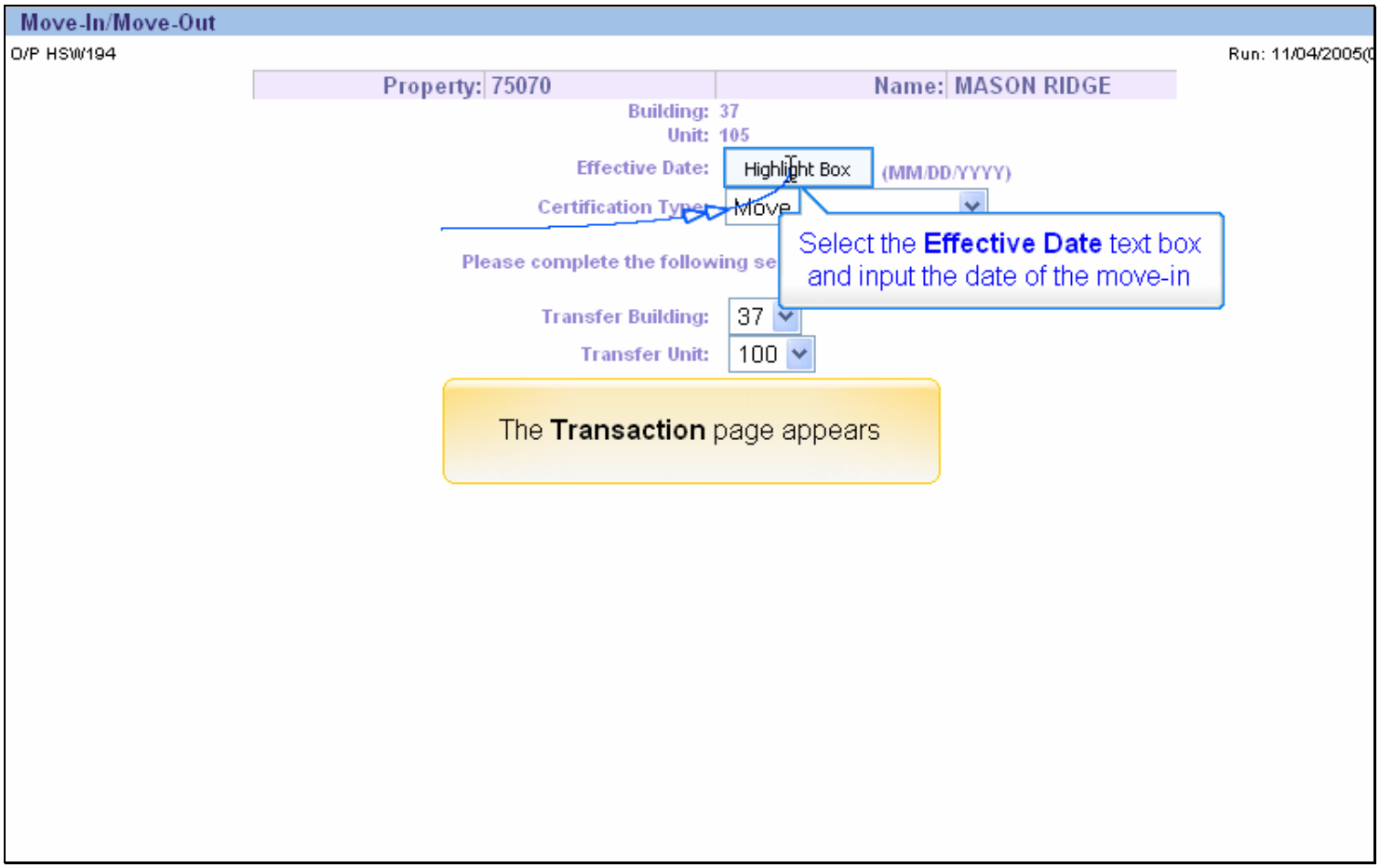
Slide 31 - Slide 31



Text Captions

Notes

Slide 32 - Slide 32



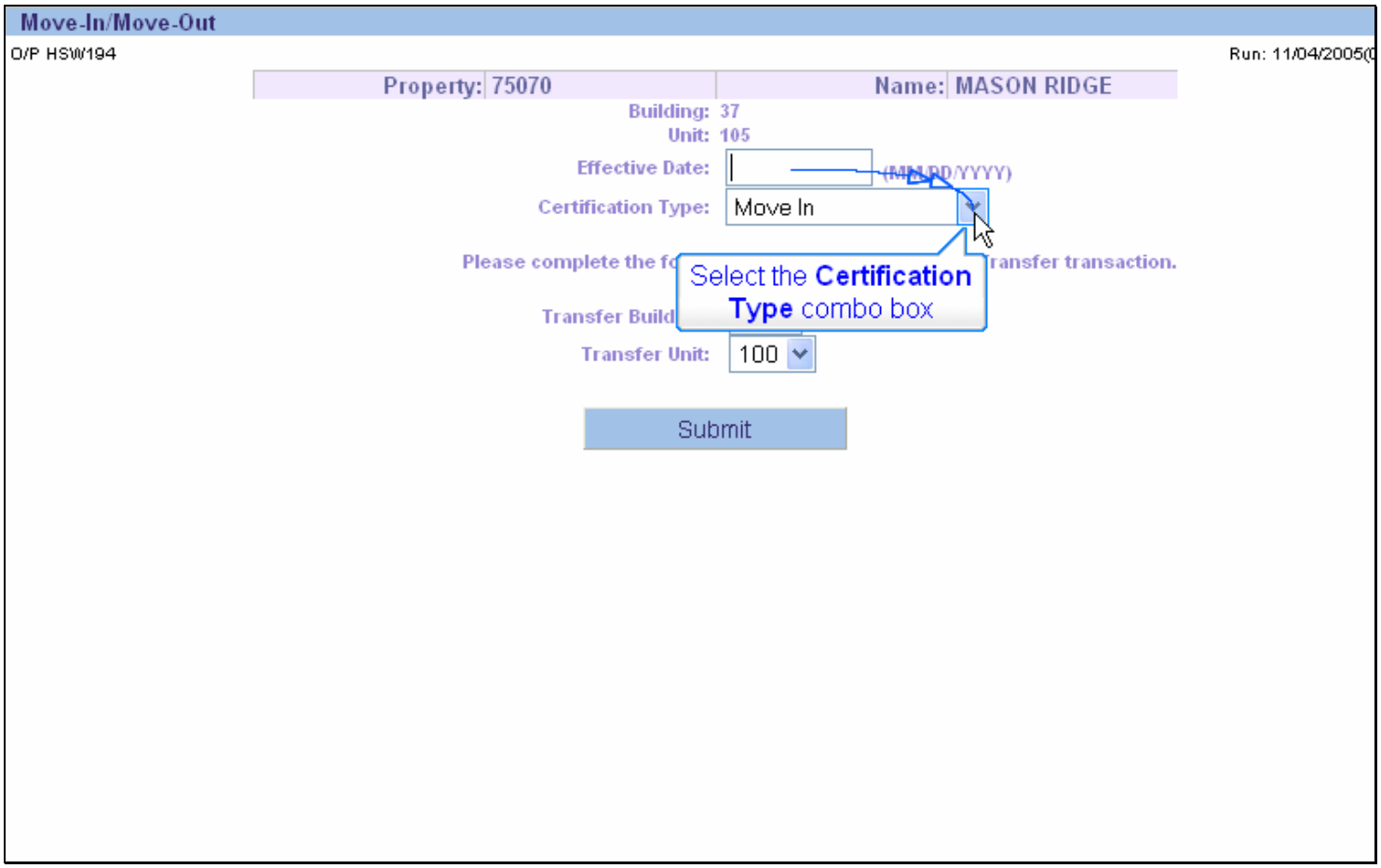
Text Captions

The **Transaction** page appears

Select the **Effective Date** text box and input the date of the move-in

Notes

Slide 33 - Slide 33

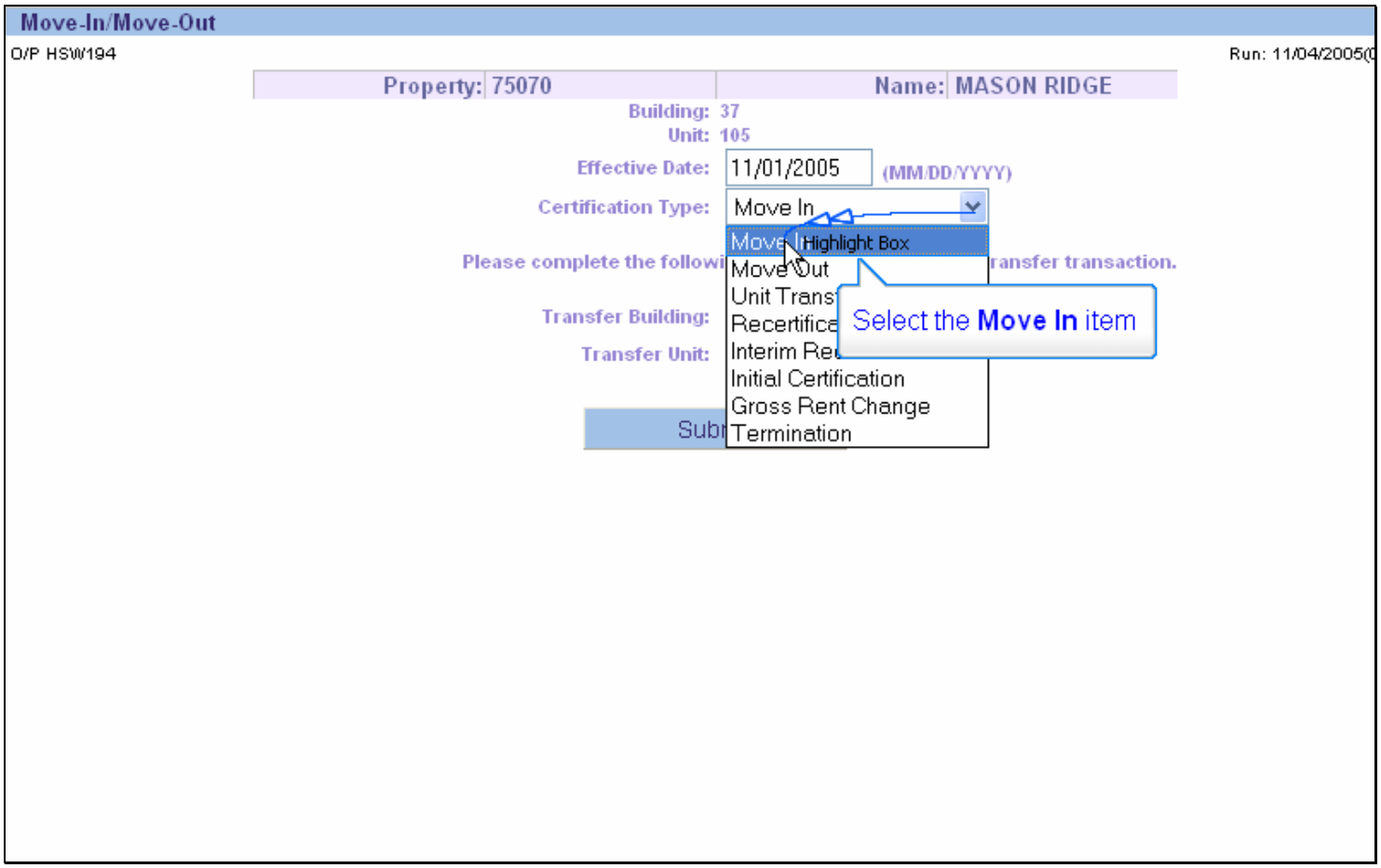


Text Captions

Select the **Certification Type** combo box

Notes

Slide 34 - Slide 34

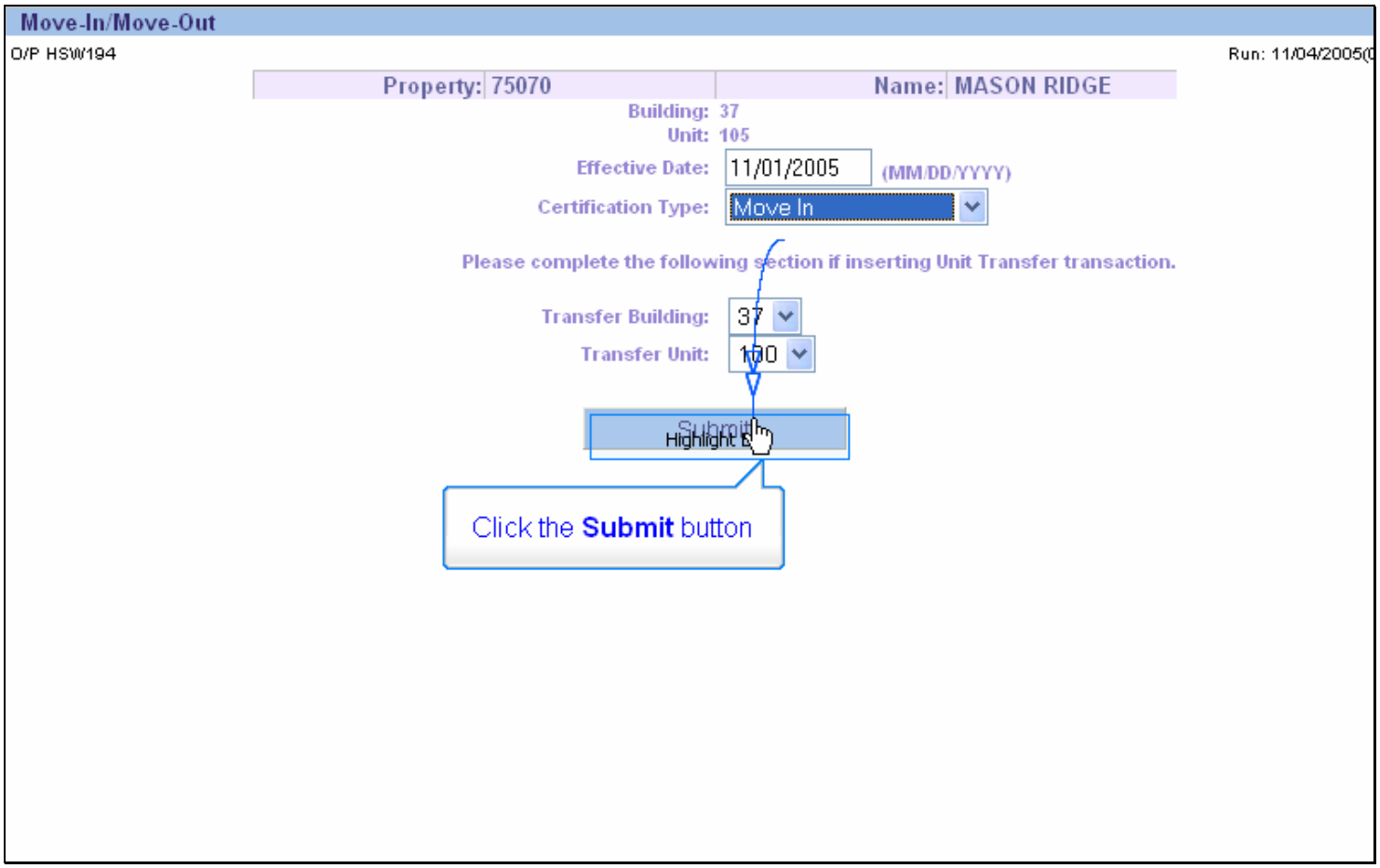


Text Captions

Select the **Move In** item

Notes

Slide 35 - Slide 35

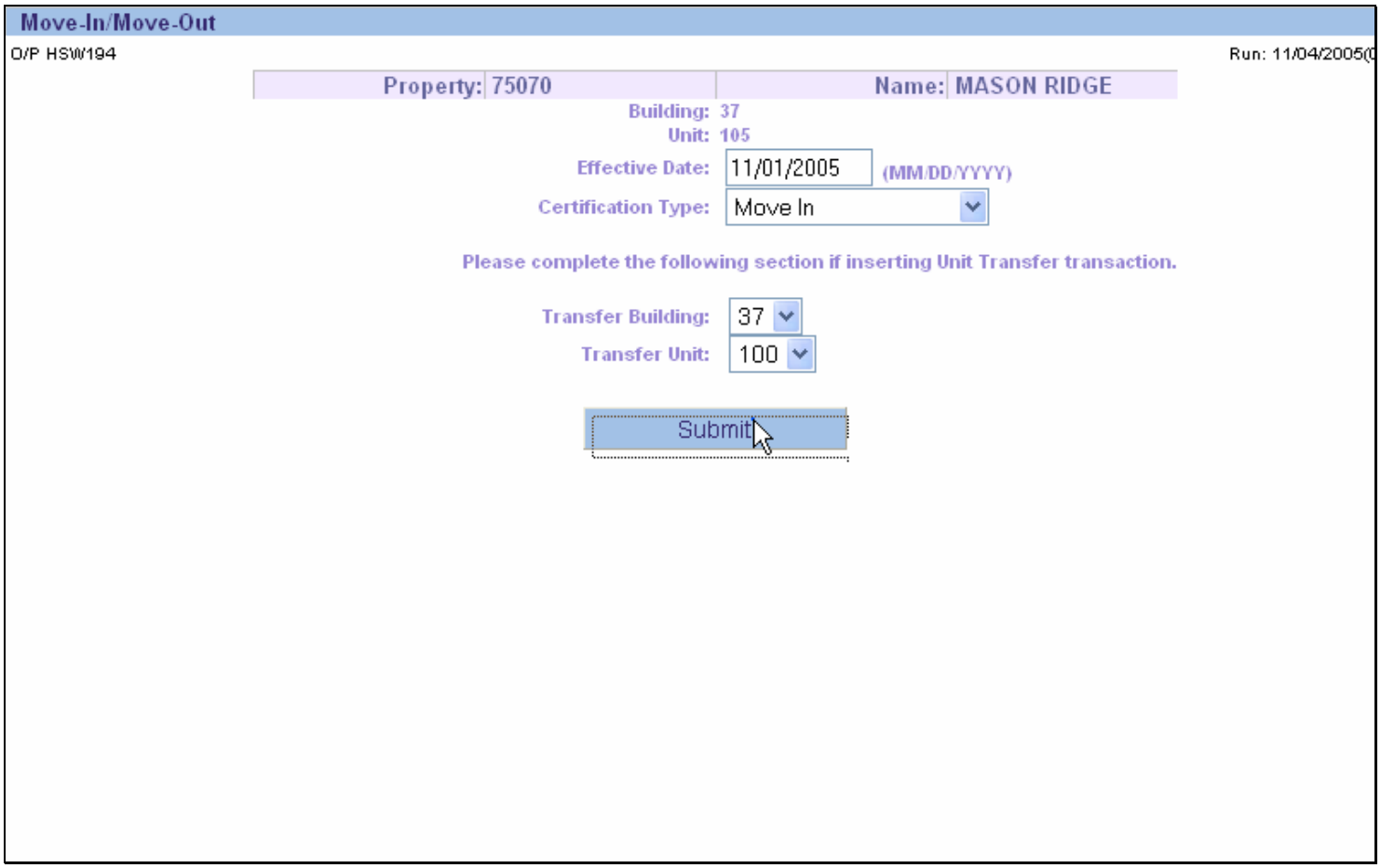


Text Captions

Click the **Submit** button

Notes

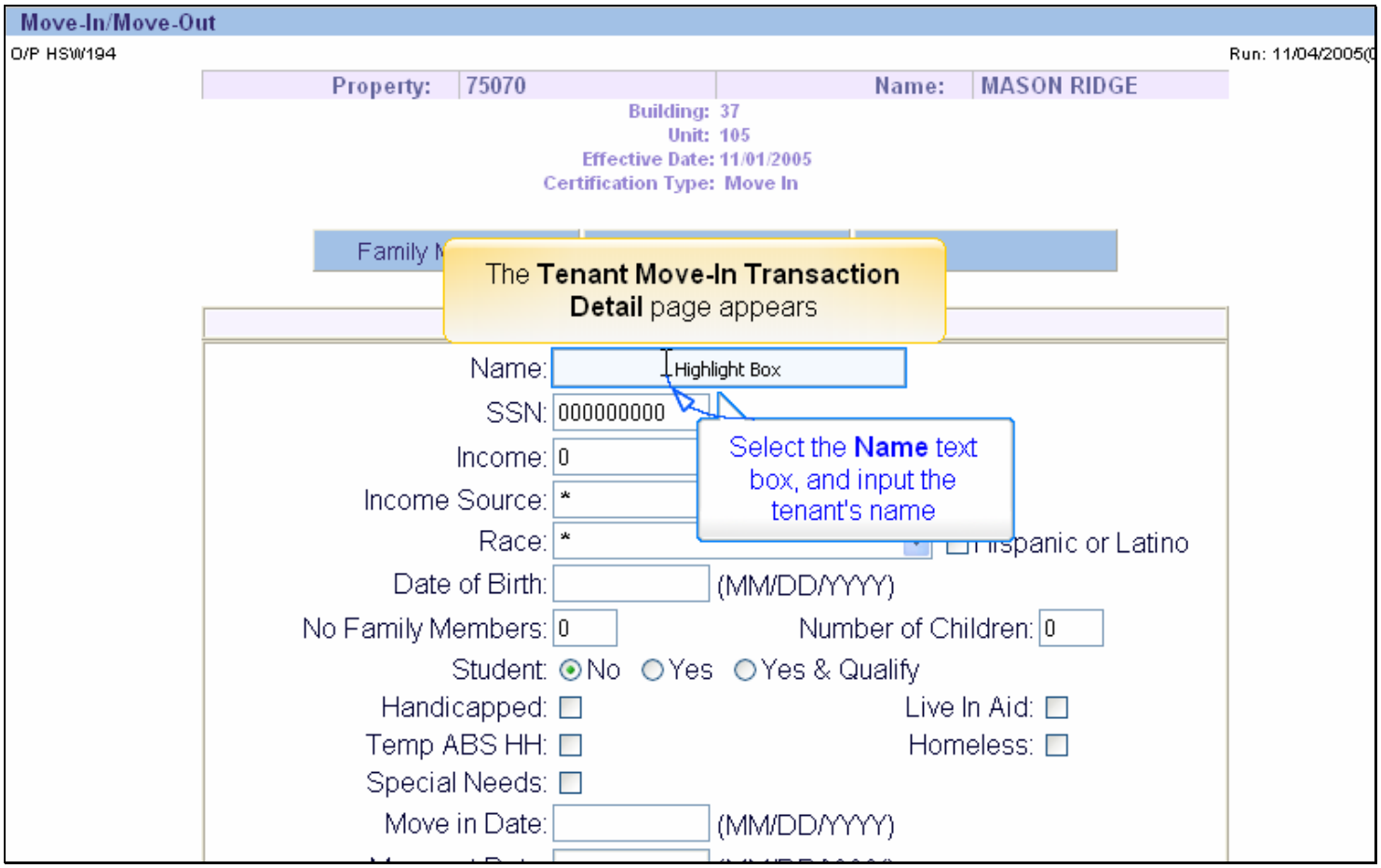
Slide 36 - Slide 36



Text Captions

Notes

Slide 37 - Slide 37



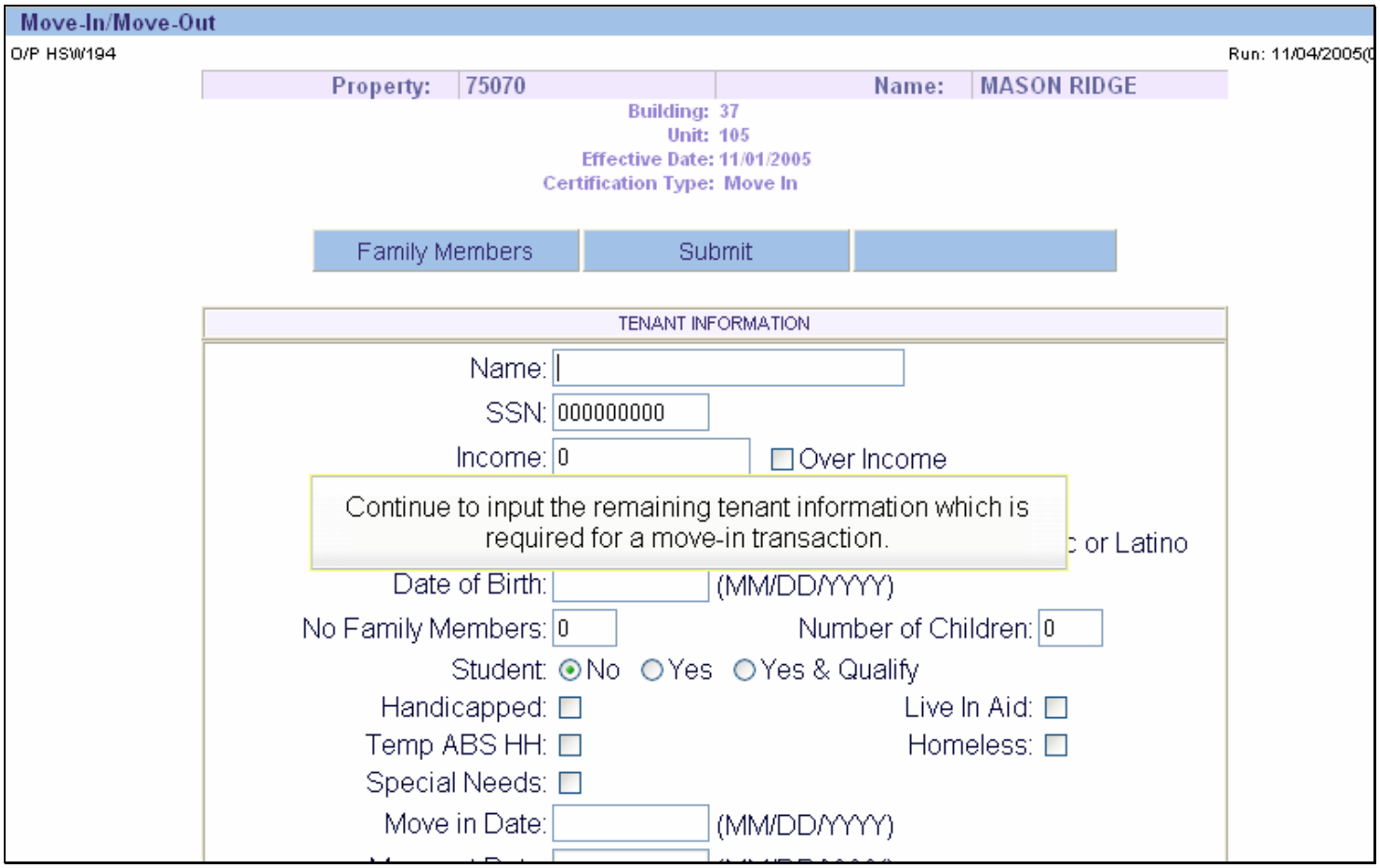
Text Captions

The **Tenant Move-In Transaction Detail** page appears

Select the **Name** text box, and input the tenant's name

Notes

Slide 38 - Slide 38

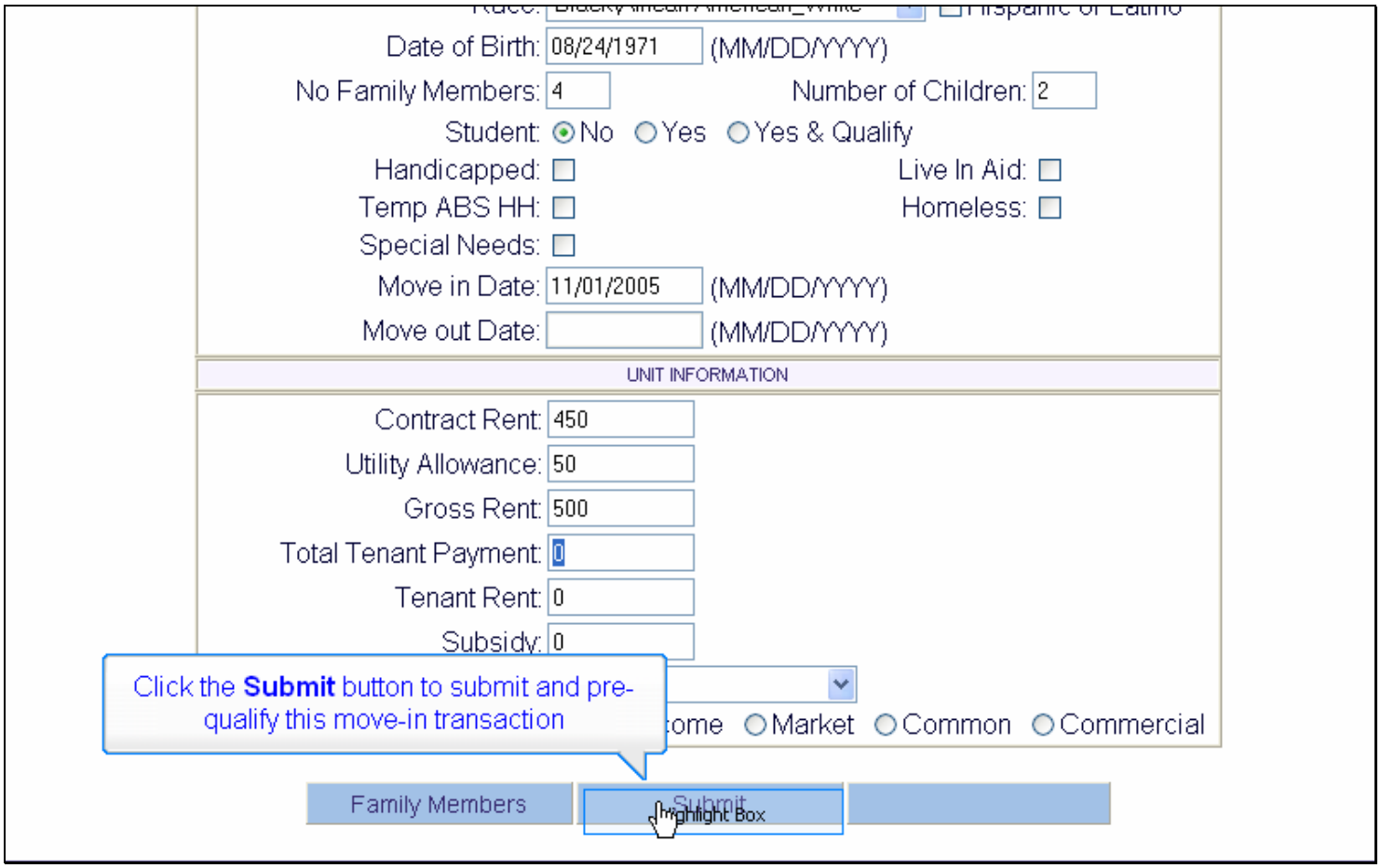


Text Captions

Continue to input the remaining tenant information which is required for a move-in transaction.

Notes

Slide 39 - Slide 39

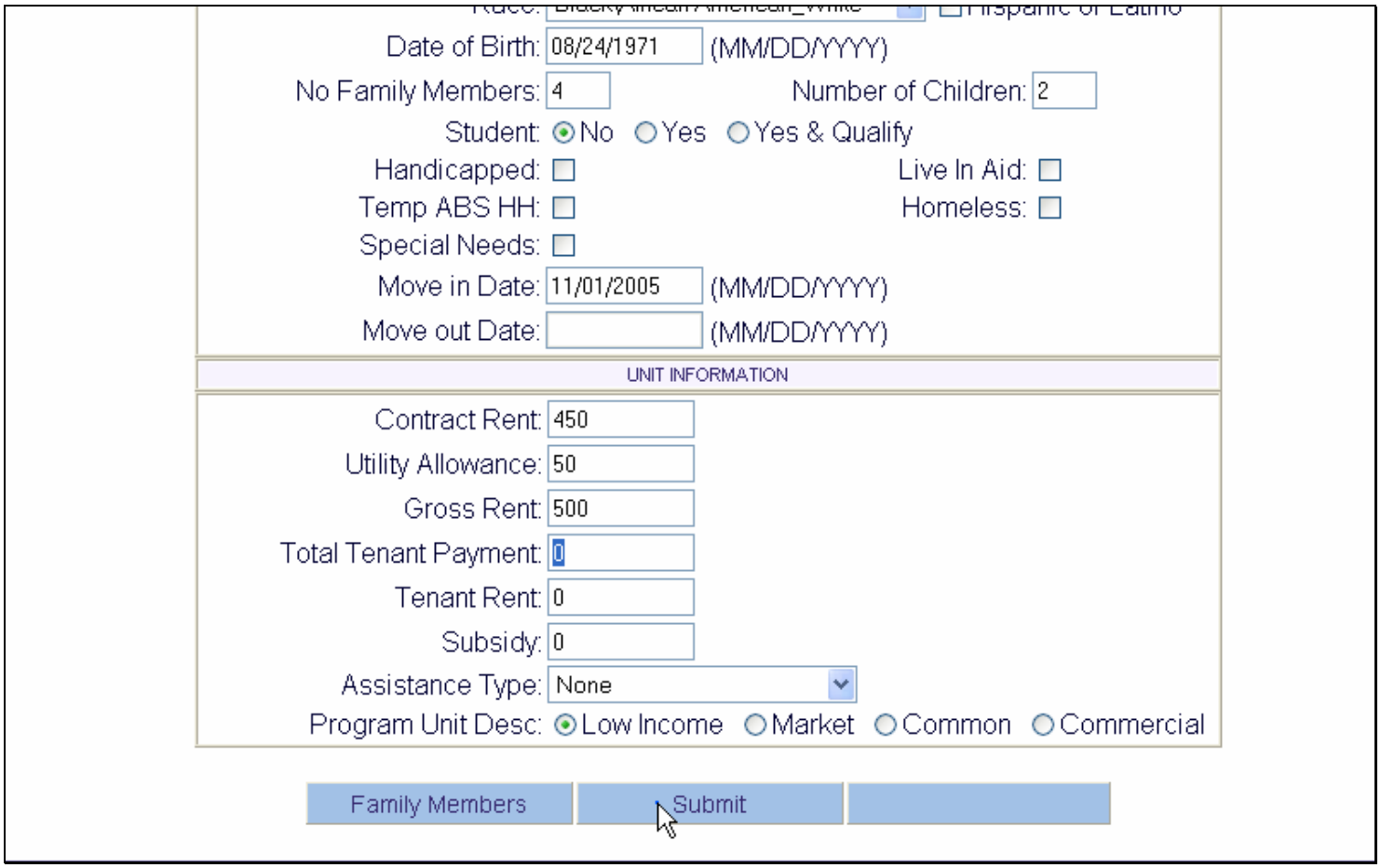


Text Captions

Click the **Submit** button to submit and pre-qualify this move-in transaction

Notes

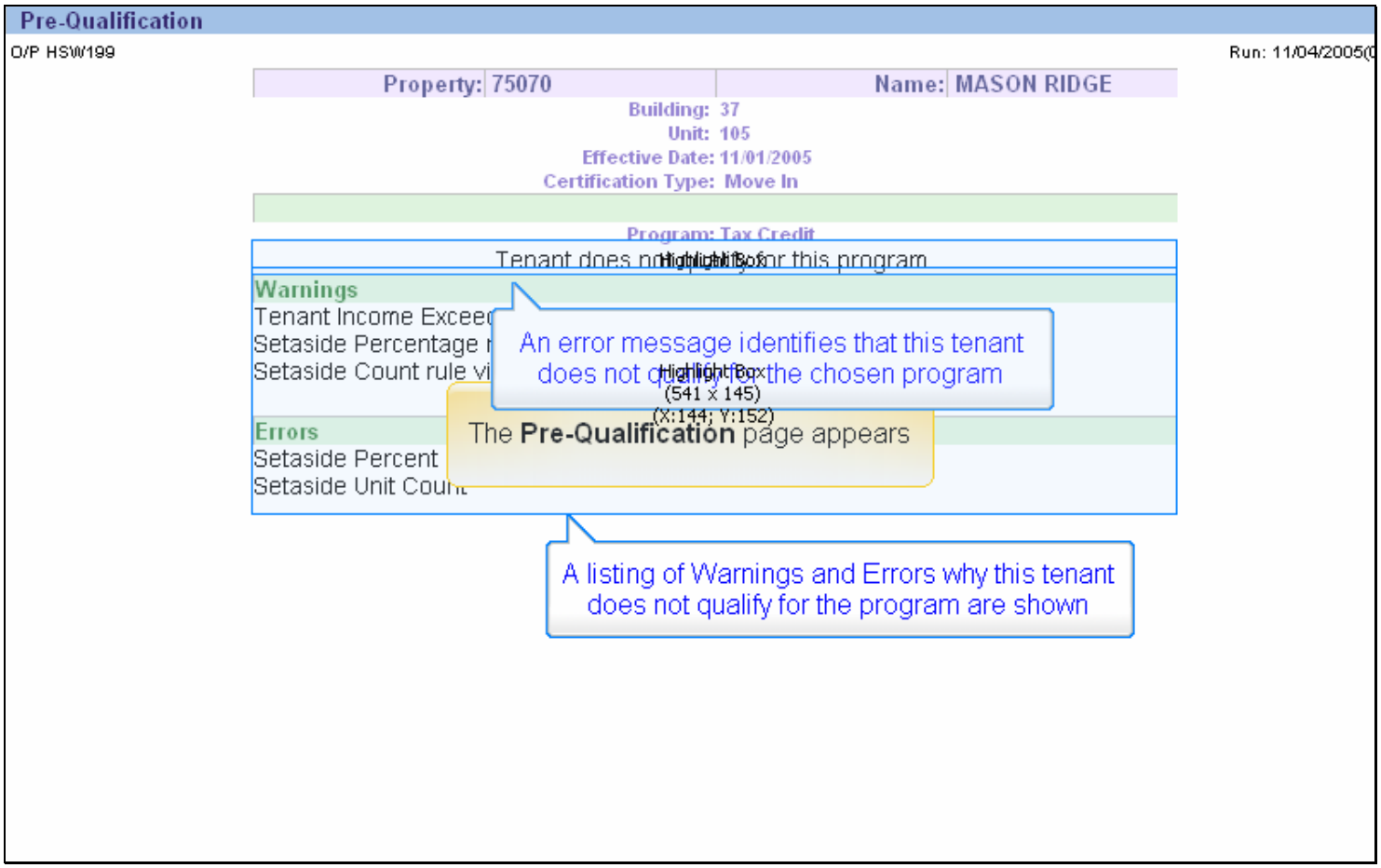
Slide 40 - Slide 40



Text Captions

Notes

Slide 41 - Slide 41



Text Captions

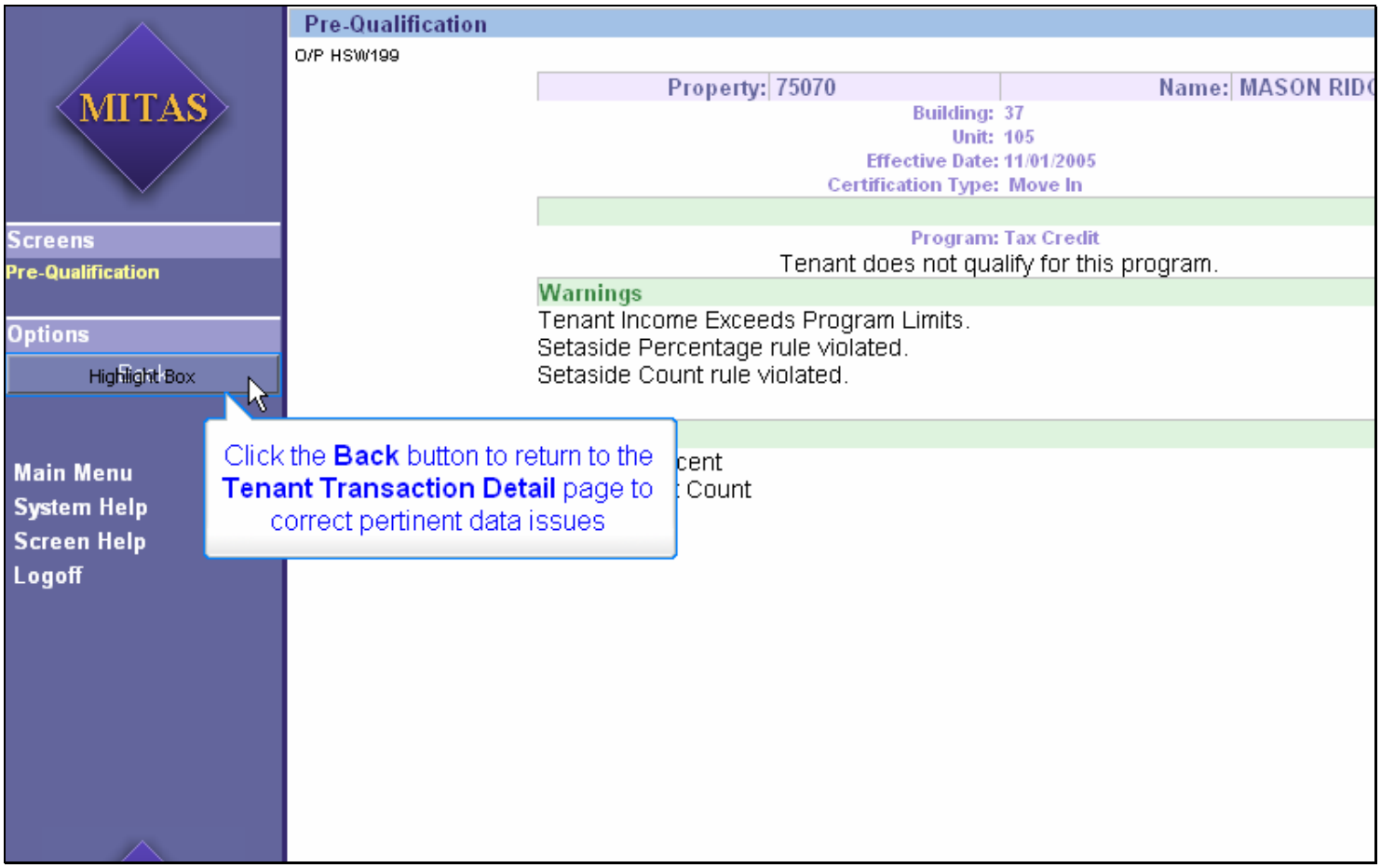
The **Pre-Qualification** page appears

An error message identifies that this tenant does not qualify for the chosen program

A listing of Warnings and Errors why this tenant does not qualify for the program are shown

Notes

Slide 42 - Slide 42

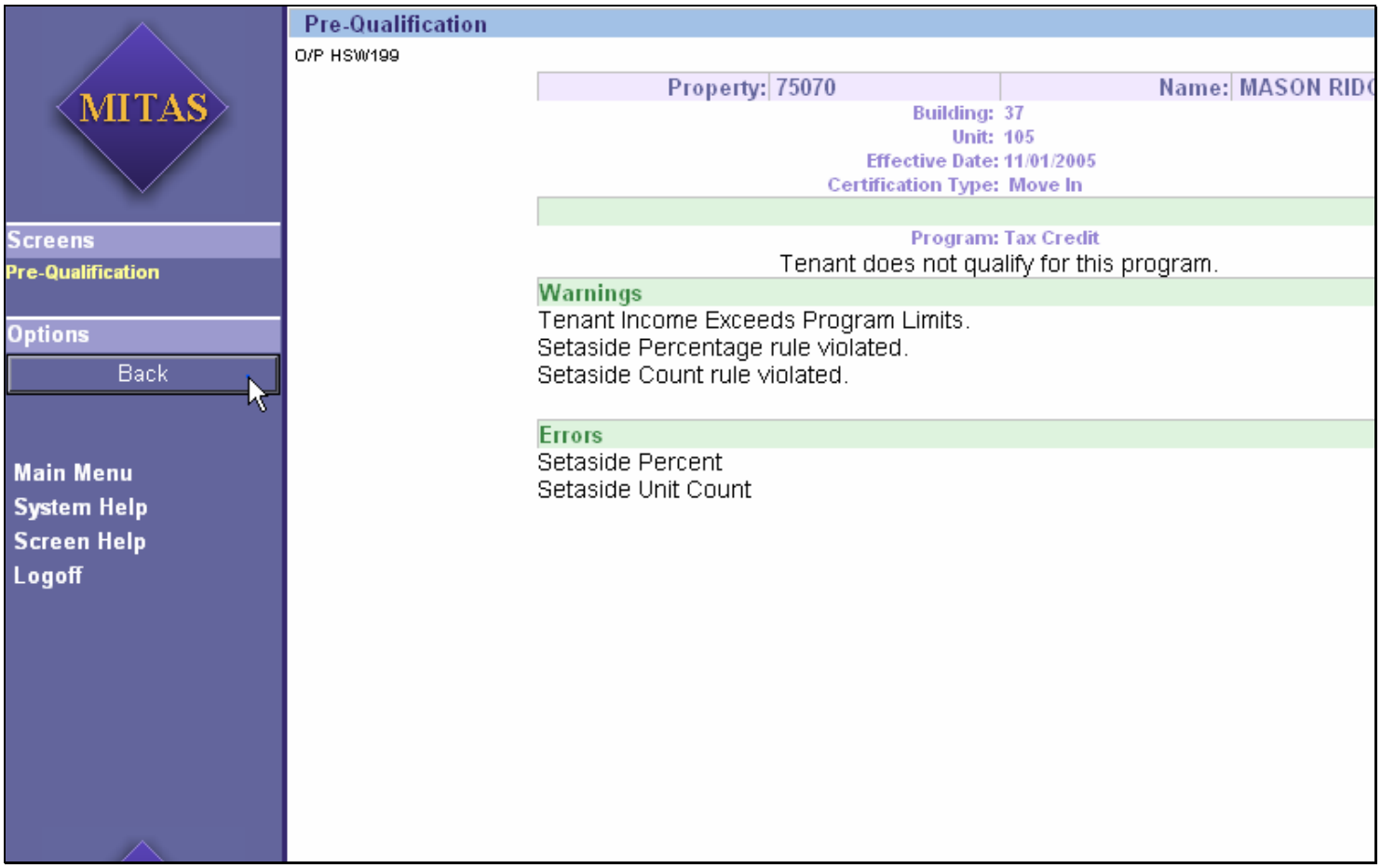


Text Captions

Click the **Back** button to return to the **Tenant Transaction Detail** page to correct pertinent data issues

Notes

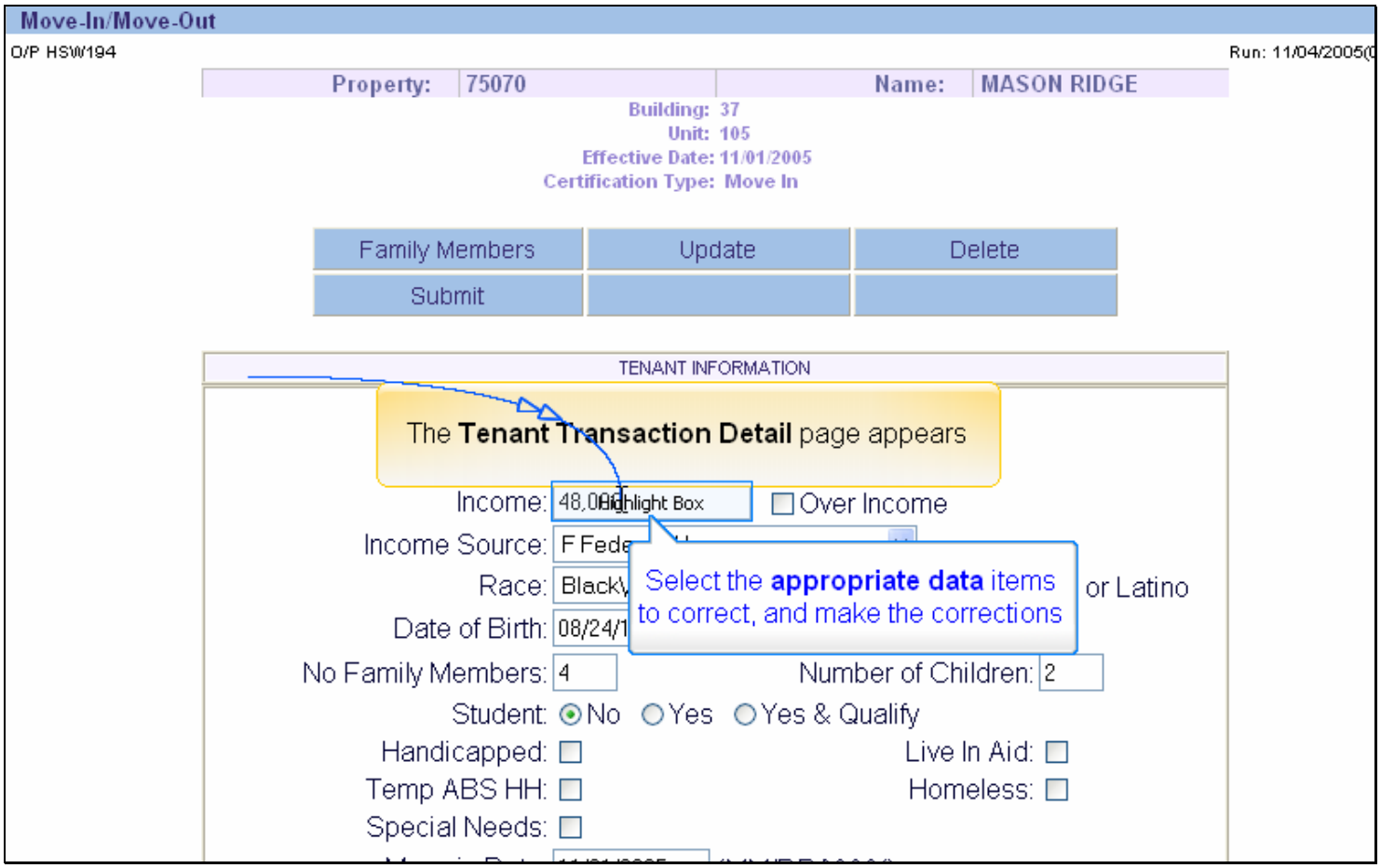
Slide 43 - Slide 43



Text Captions

Notes

Slide 44 - Slide 44



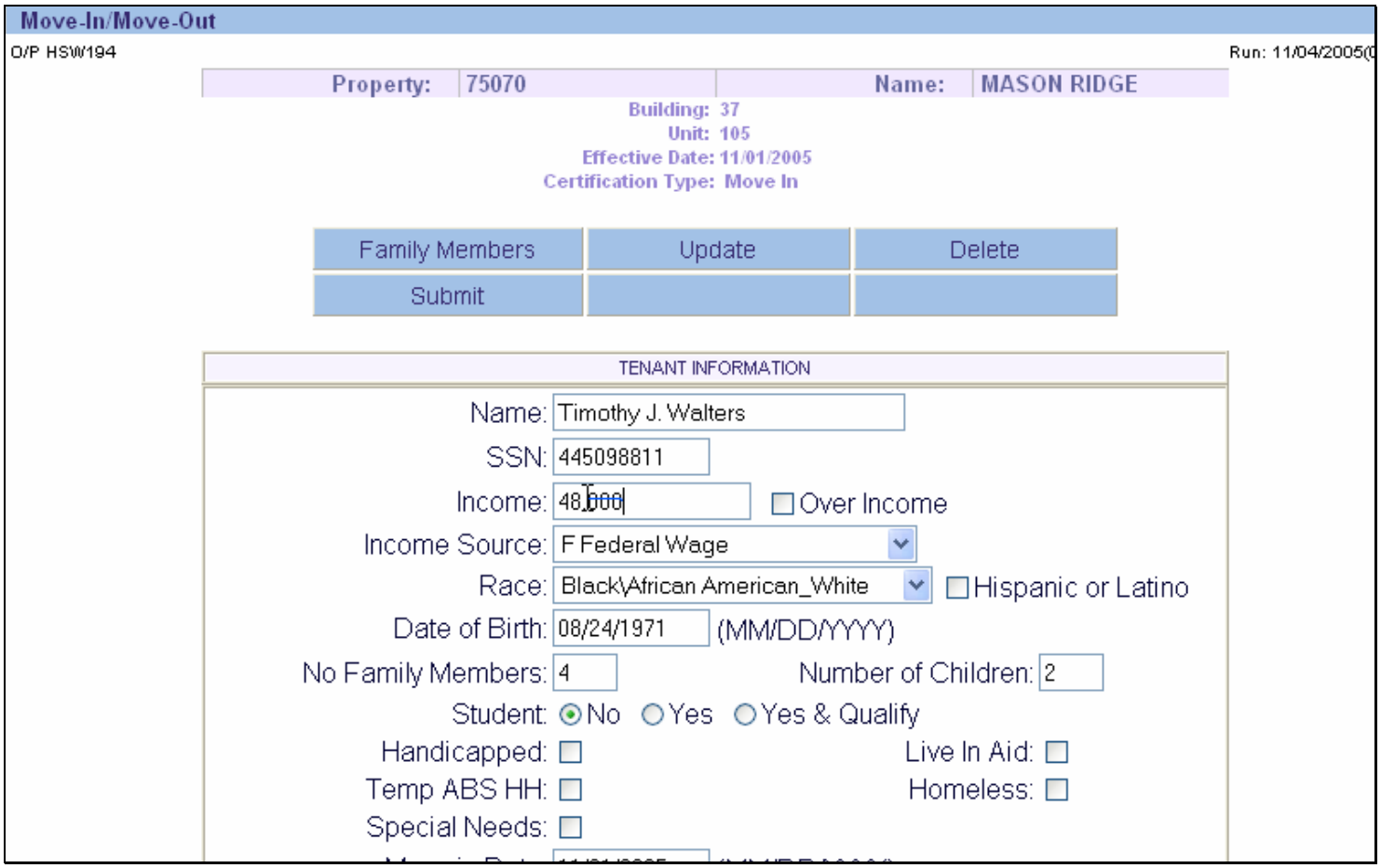
Text Captions

The **Tenant Transaction Detail** page appears

Select the **appropriate data** items to correct, and make the corrections

Notes

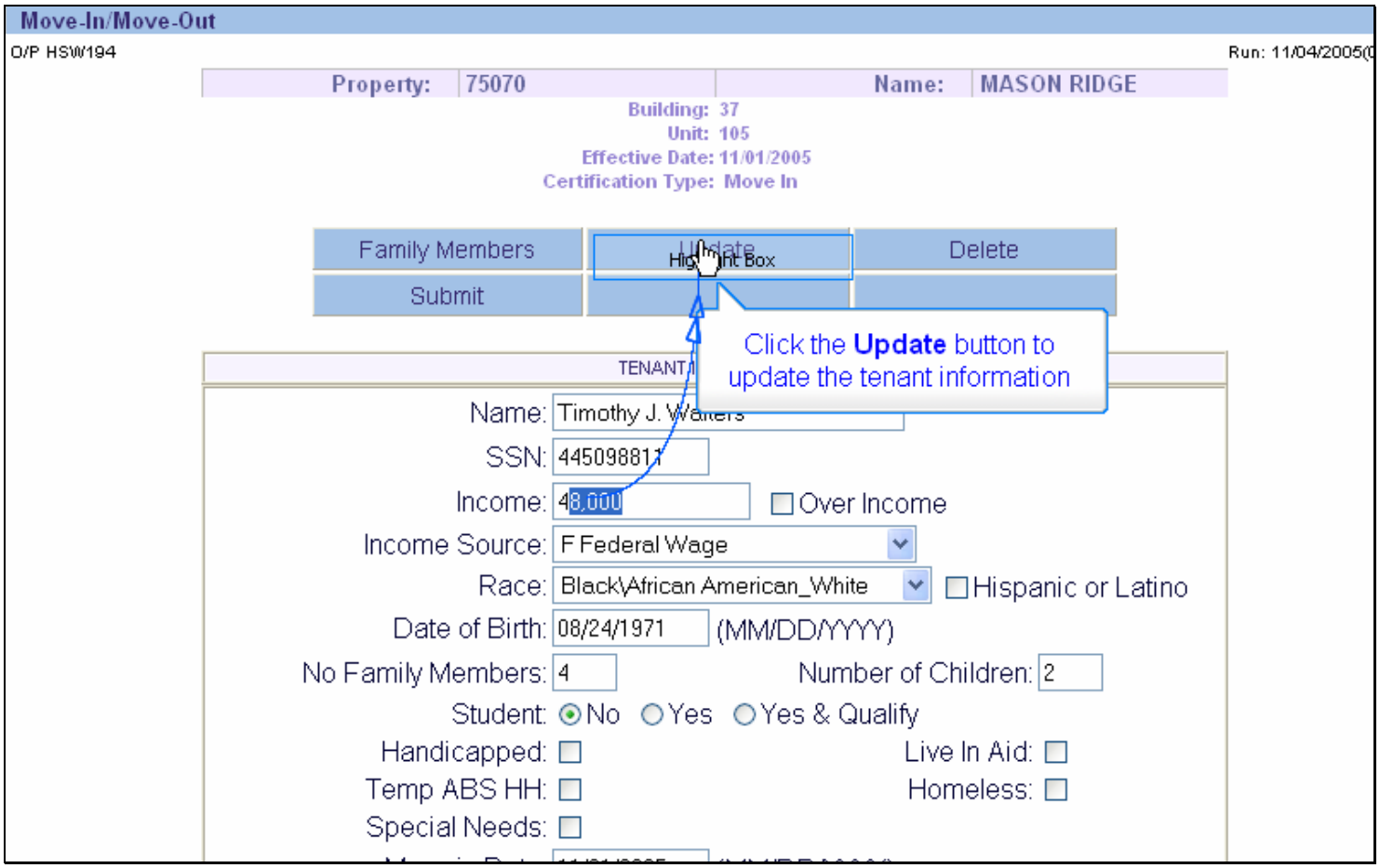
Slide 45 - Slide 45



Text Captions

Notes

Slide 46 - Slide 46

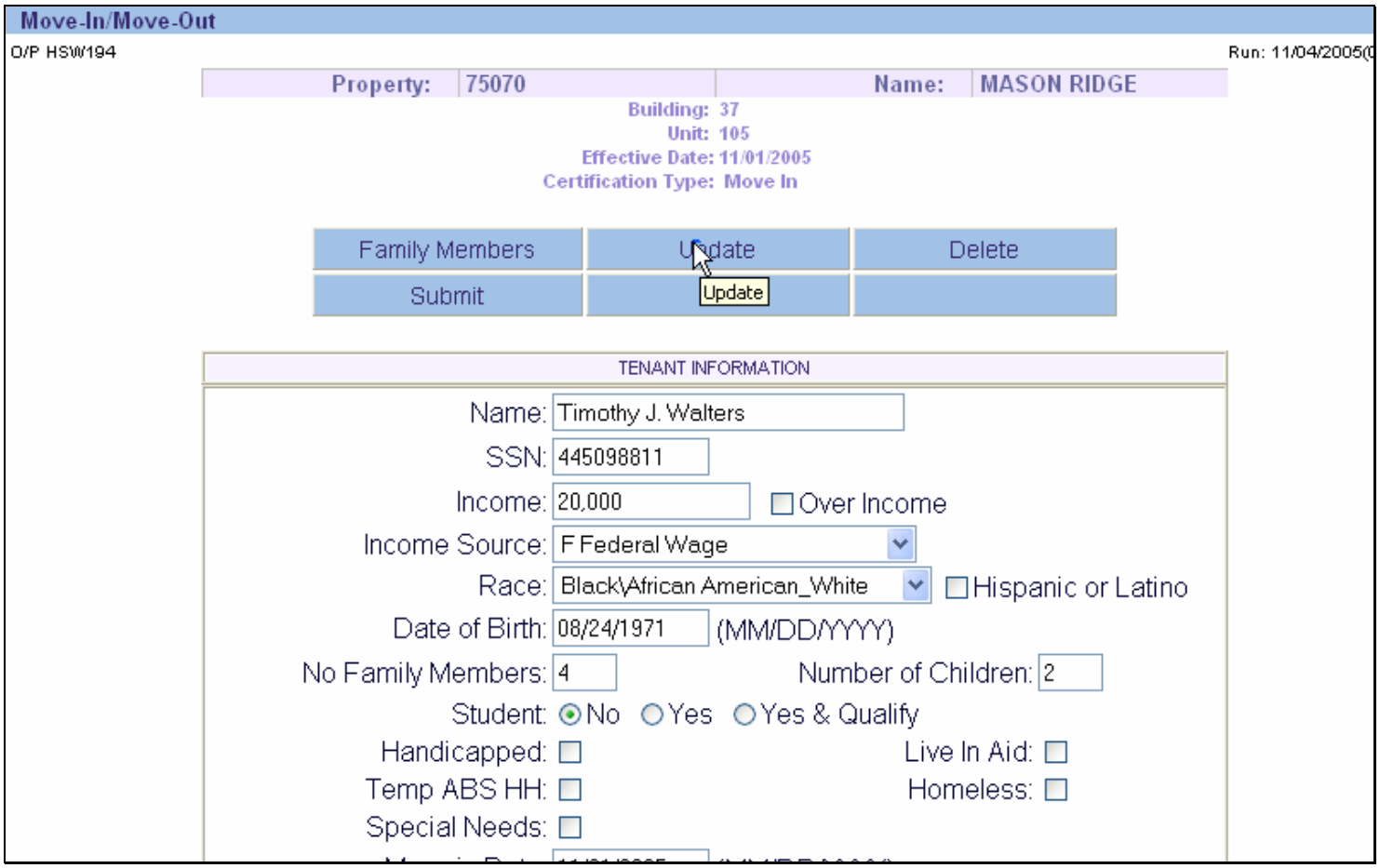


Text Captions

Click the **Update** button to update the tenant information

Notes

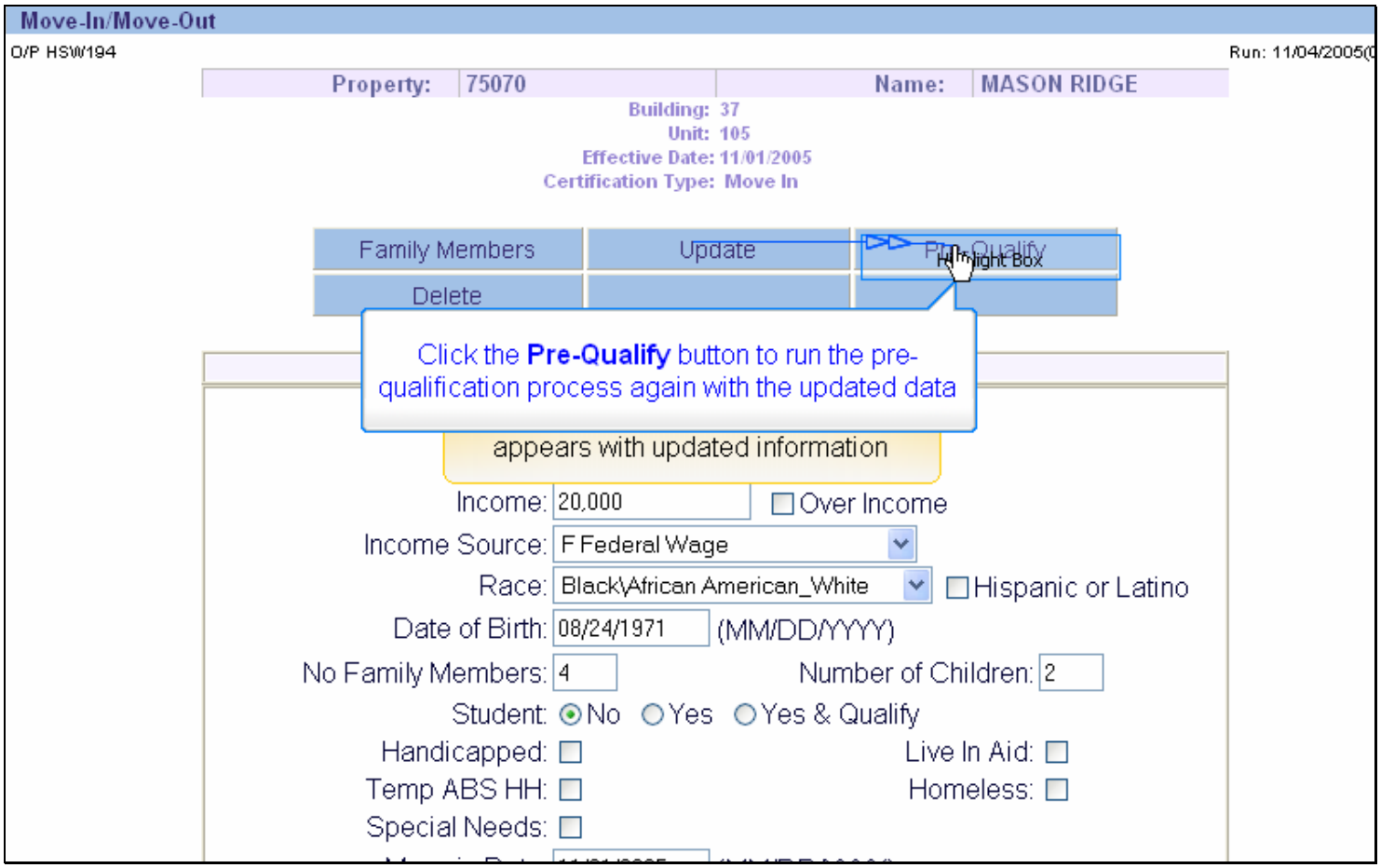
Slide 47 - Slide 47



Text Captions

Notes

Slide 48 - Slide 48



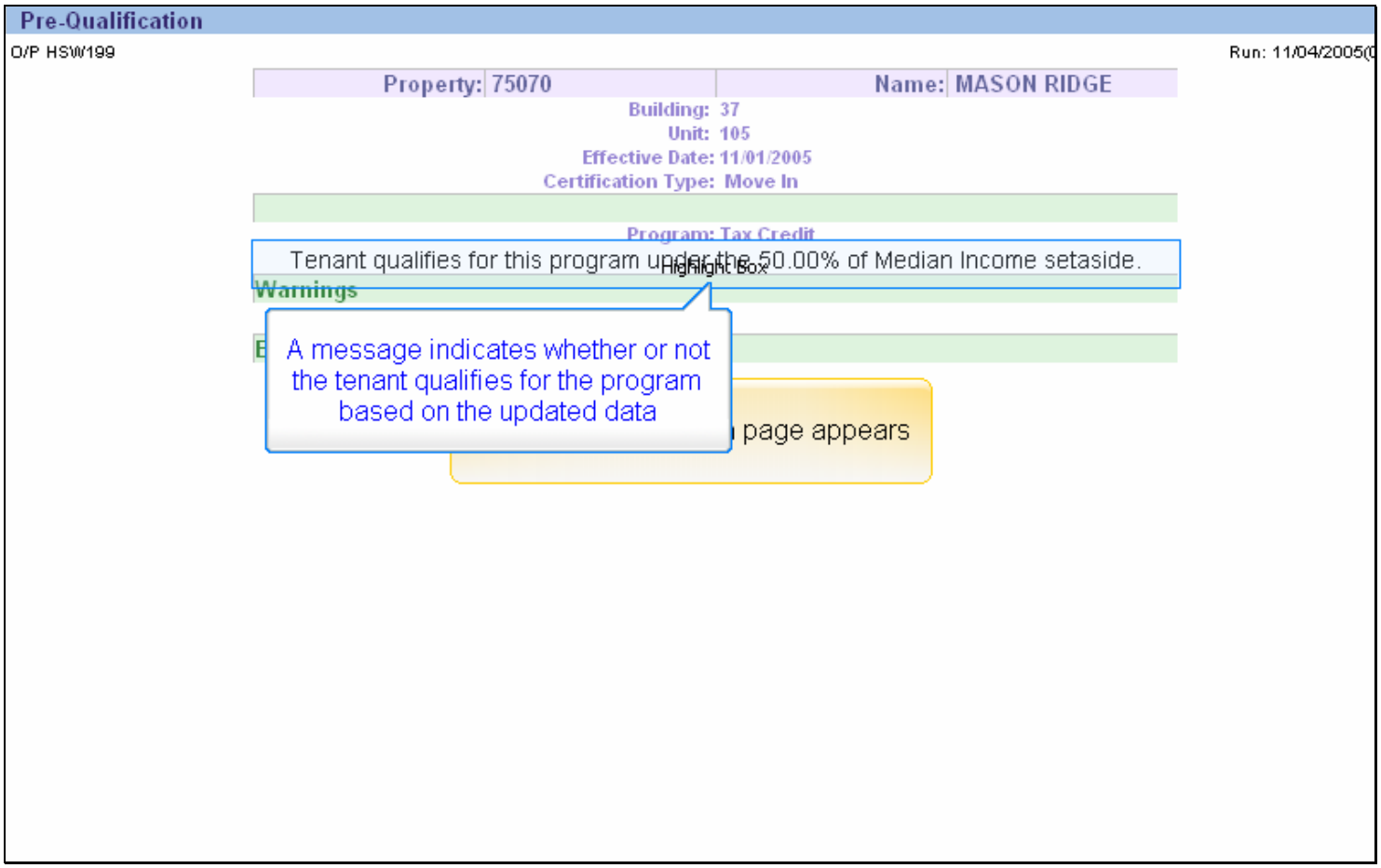
Text Captions

The **Tenant Transaction Detail** page appears with updated information

Click the **Pre-Qualify** button to run the pre-qualification process again with the updated data

Notes

Slide 49 - Slide 49



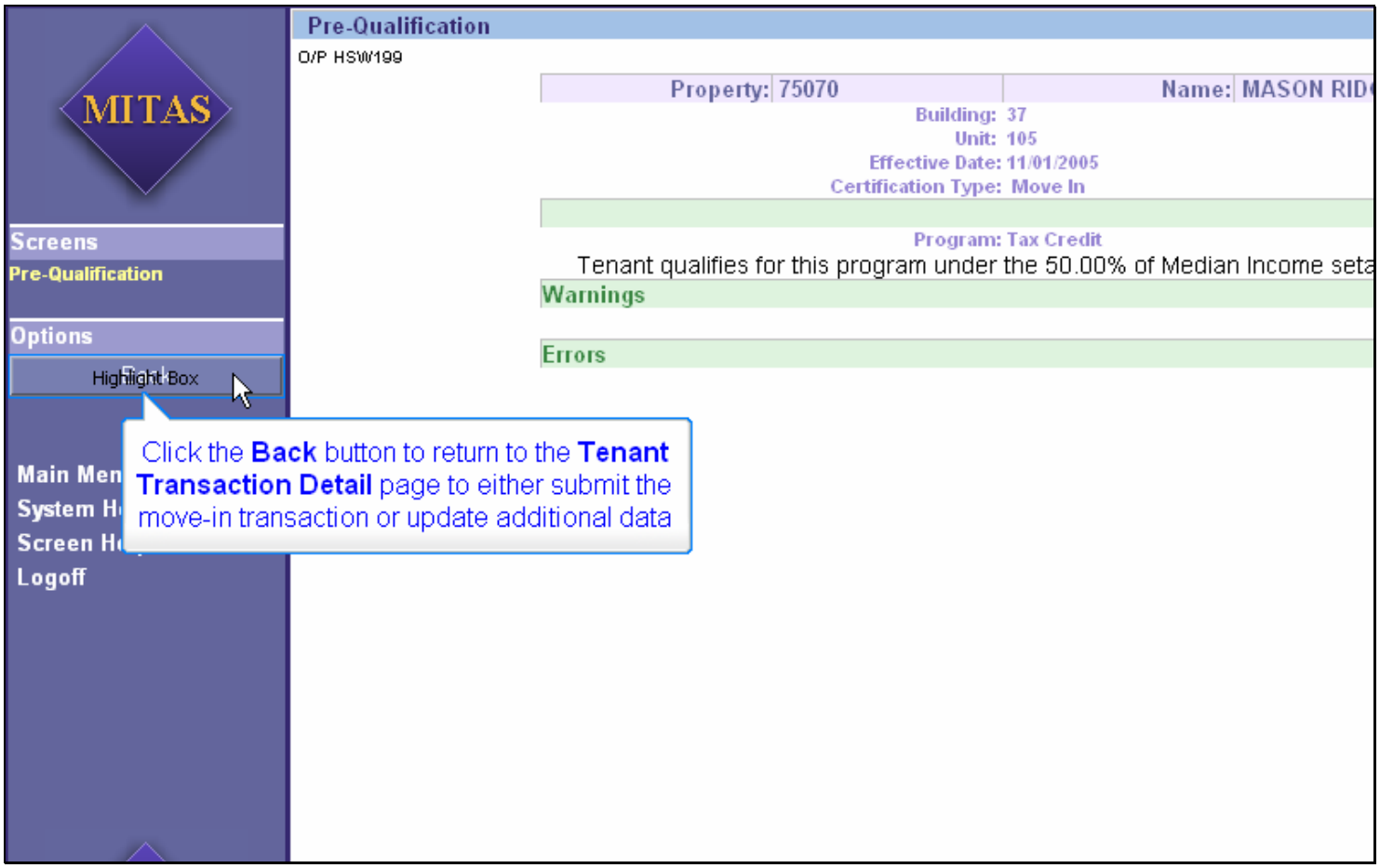
Text Captions

The **Pre-Qualification** page appears

A message indicates whether or not the tenant qualifies for the program based on the updated data

Notes

Slide 50 - Slide 50

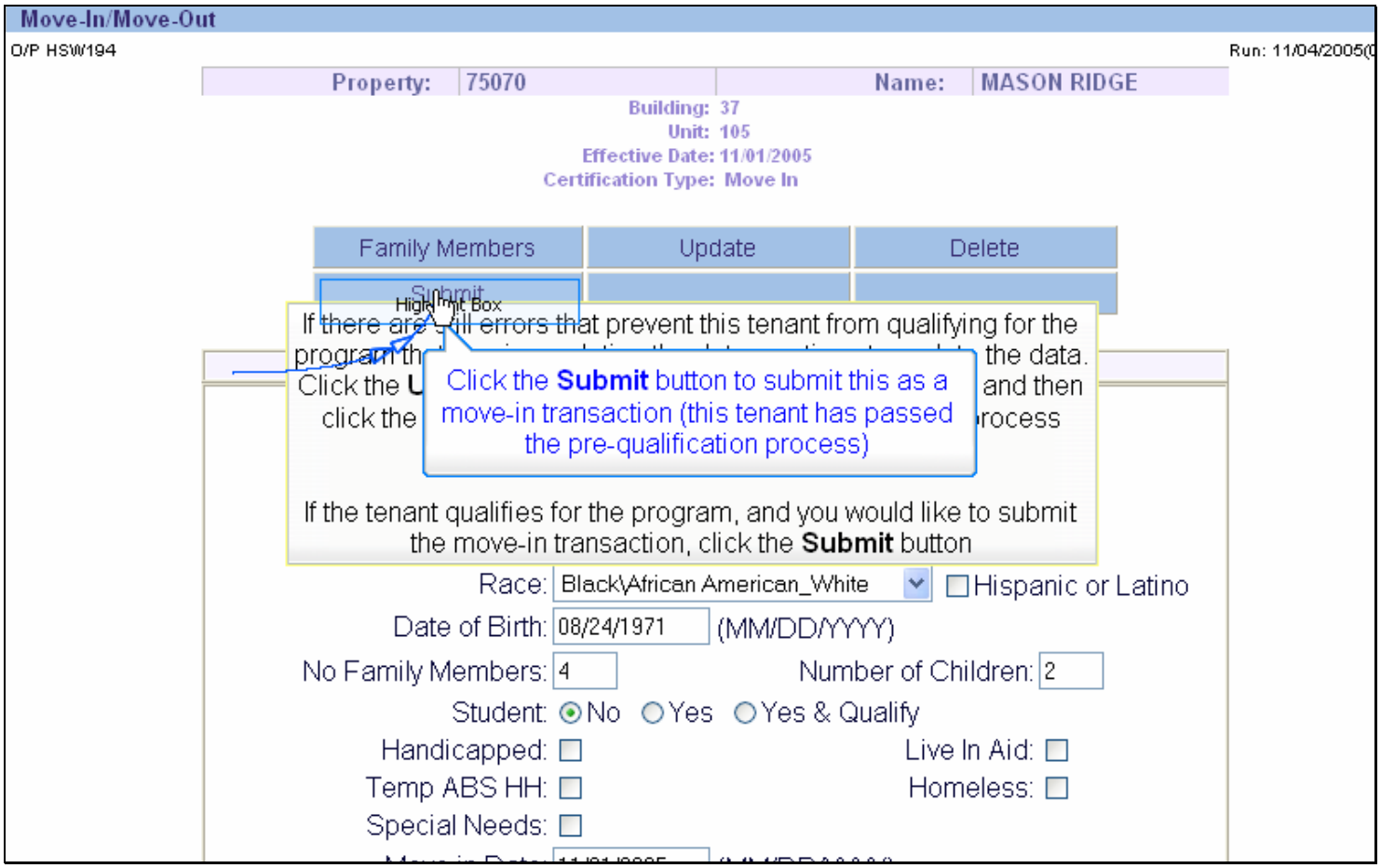


Text Captions

Click the **Back** button to return to the **Tenant Transaction Detail** page to either submit the move-in transaction or update additional data

Notes

Slide 51 - Slide 51



Text Captions

The **Tenant Transaction Detail** page appears

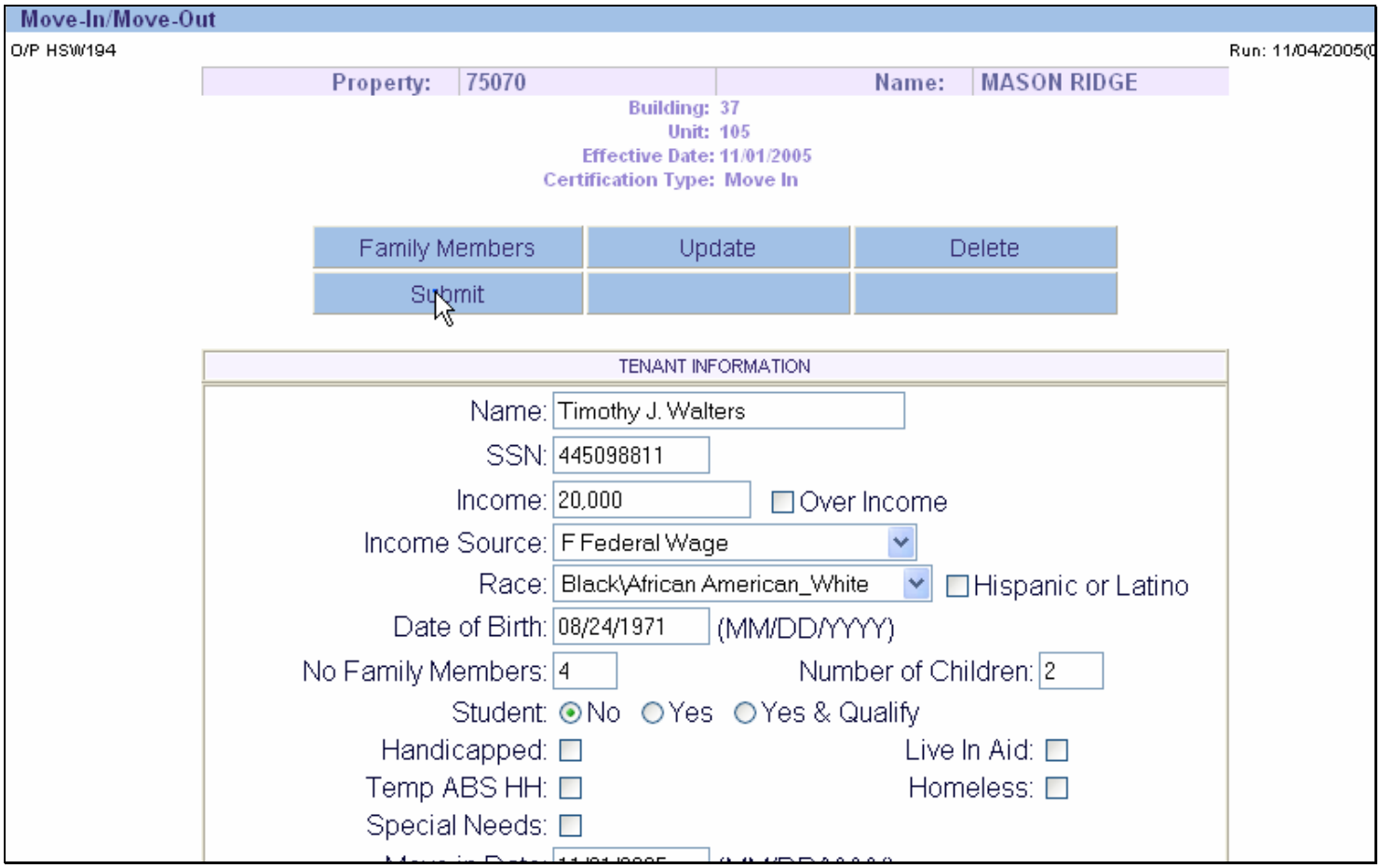
If there are still errors that prevent this tenant from qualifying for the program that require updating the data, continue to update the data. Click the **Update** button once the data has been updated, and then click the **Pre-Qualify** button to run the pre-qualification process again.

If the tenant qualifies for the program, and you would like to submit the move-in transaction, click the **Submit** button

Click the **Submit** button to submit this as a move-in transaction (this tenant has passed the pre-qualification process)

Notes

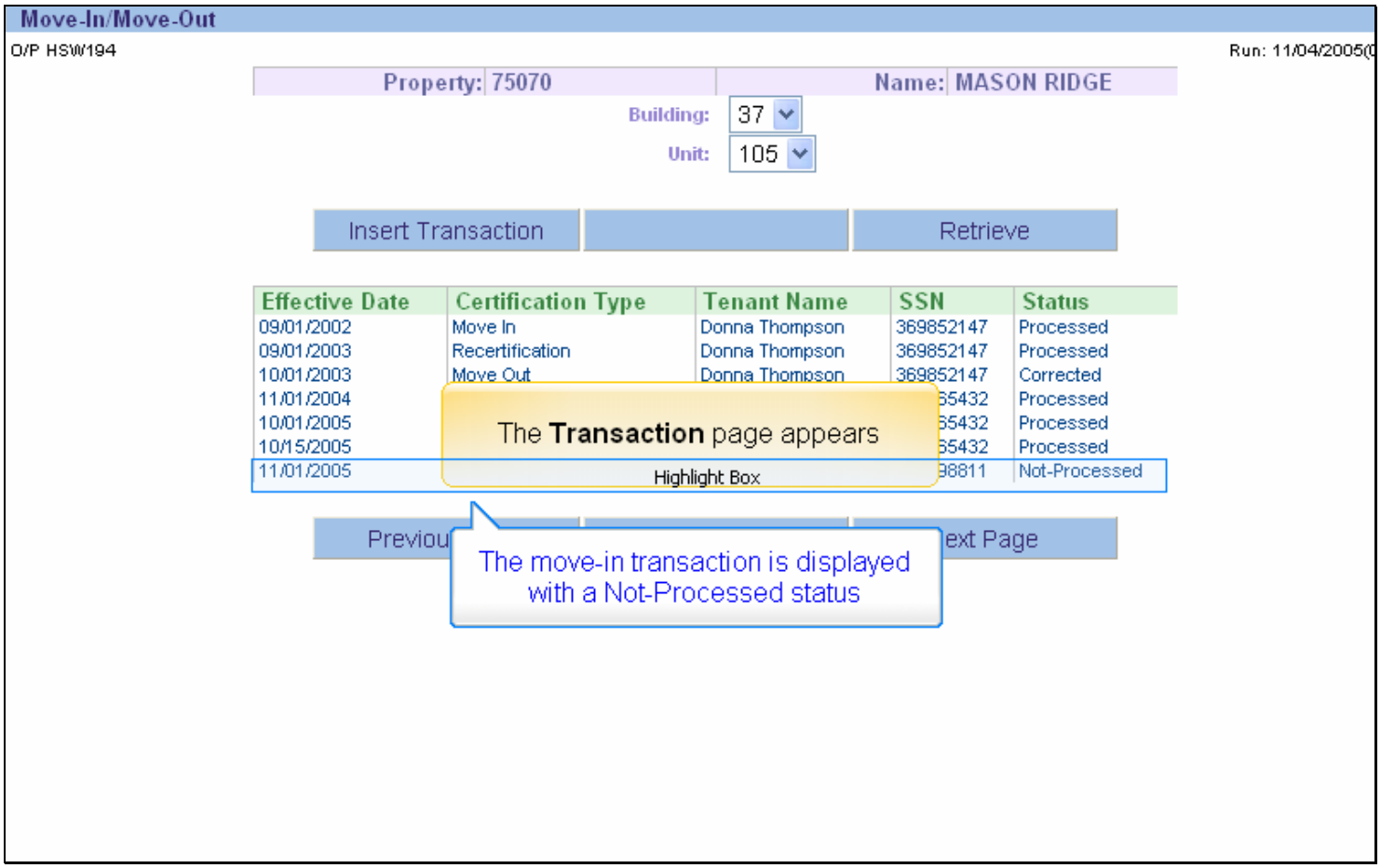
Slide 52 - Slide 52



Text Captions

Notes

Slide 53 - Slide 53



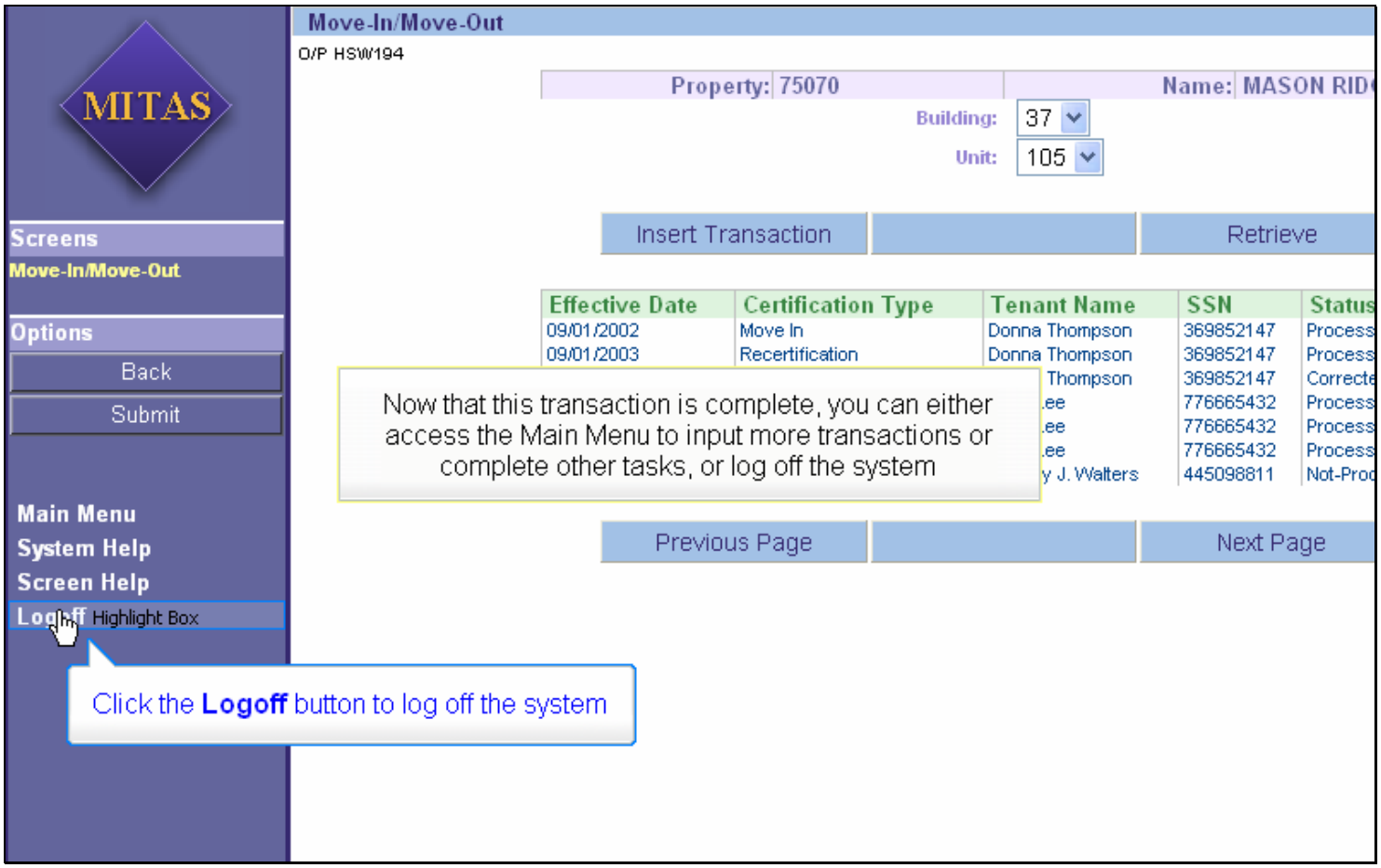
Text Captions

The **Transaction** page appears

The move-in transaction is displayed with a Not-Processed status

Notes

Slide 54 - Slide 54



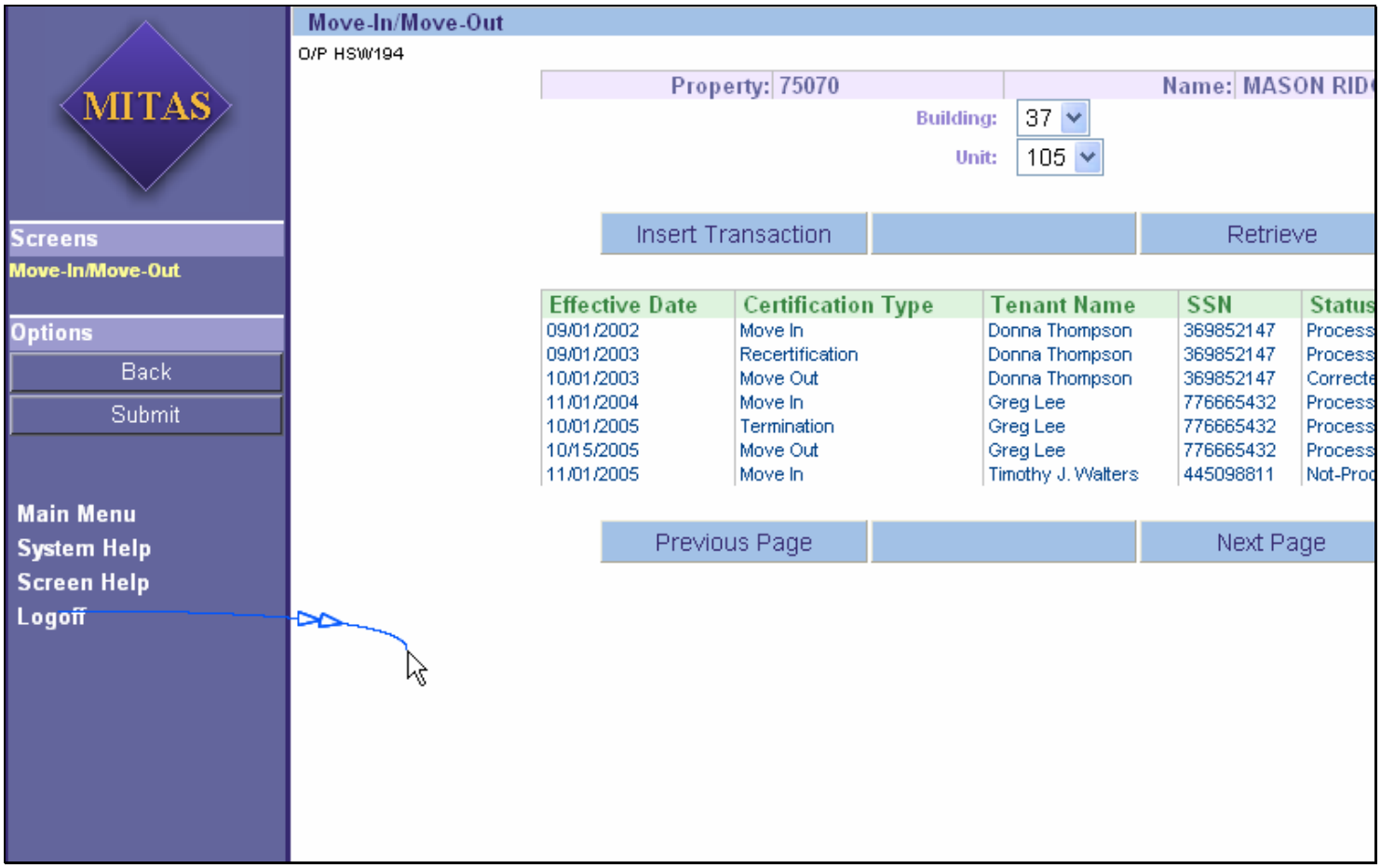
Text Captions

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

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

Notes

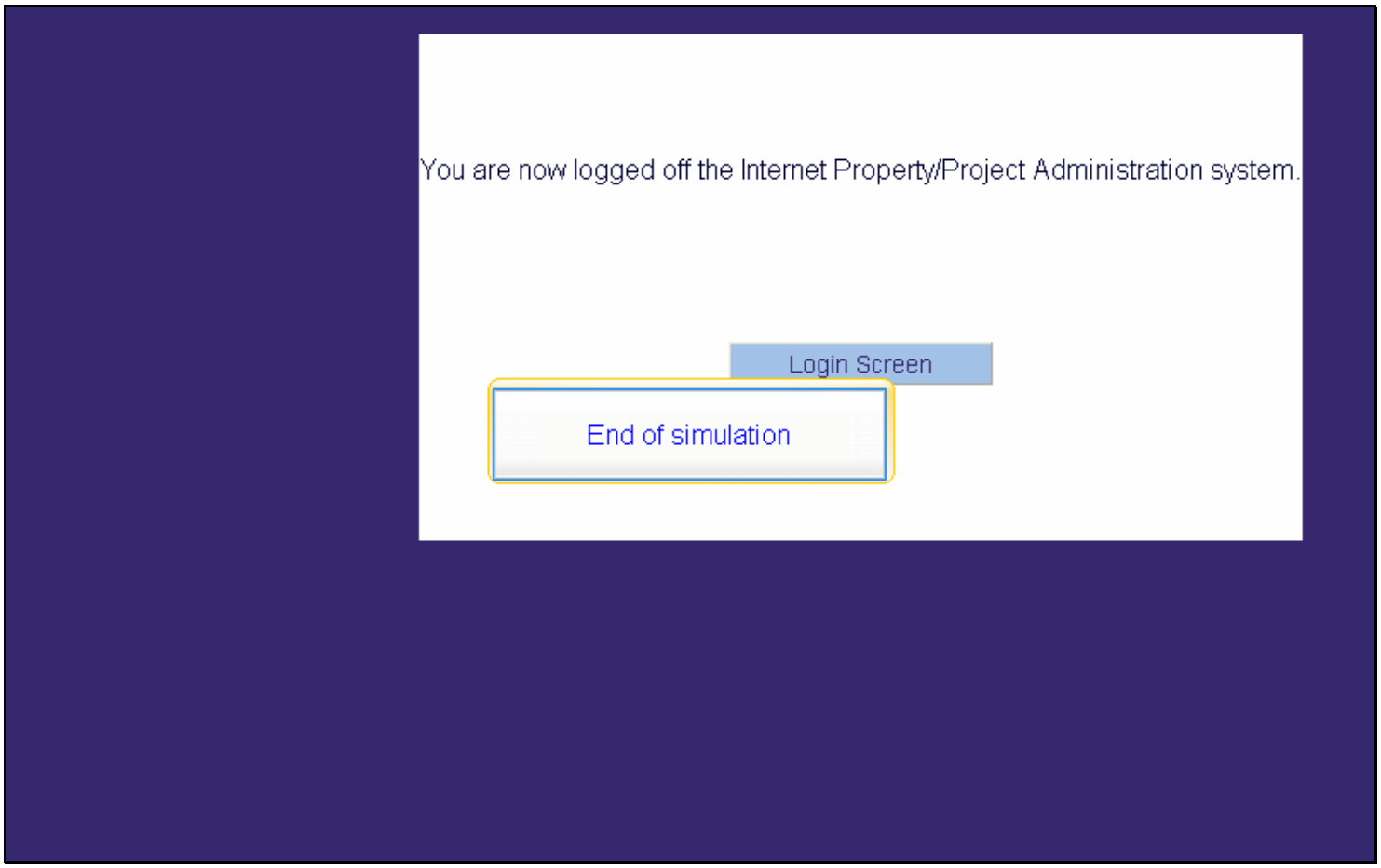
Slide 55 - Slide 55



Text Captions

Notes

Slide 56 - Slide 56



Text Captions

The **Logoff** page appears

End of simulation

Notes

Slide 57 - End

Text Captions

Congratulations!
You have completed Pre-Qualifying a Move-In Transaction

Notes