

Slide 1 - Title



Online Learning Module

Creating an Interim Recertification Transaction

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Text Captions

Creating an Interim Recertification Transaction

Notes

Slide 2 - Objectives

Section One

Objectives

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

Creating an Interim Recertification

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Text Captions

Section One**Objectives**

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Notes

Slide 3 - Scenario

Scenario

Vicky, a property manager calls you...

"Hi Becky, I need to create an interim recertification 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 Vicky.

Creating an Interim Recertification Transaction

Vicky at her desk

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Text Captions**Scenario**

Vicky, a property manager calls you...

"Hi Becky, I need to create an interim recertification 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 Vicky.

Notes

Slide 4 - Definition

Definition of an Interim Recertification

An **Interim Recertification** should be used when there is a change in the tenant's eligibility for a program, such as a change in income, rent, or student status. The system will process the tenant information through the tenant compliance verifying tenant eligibility.

An interim recertification is not the same as a recertification transaction. The annual certification requirement is not met by using an interim recertification transaction, and the next recertification date (annual due date) is not reset when using this transaction type. The annual certification is completed by using the **Recertification** transaction.

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Text Captions

Definition of an Interim Recertification

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Notes

Slide 5 - Concept

How to Create an Interim Recertification

It is easy to create an interim recertification 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 **Interim Recertification** as the Certification Type. Click **Submit** to access the tenant information. Verify and input tenant information, and click **Submit** to submit the transaction.

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Text Captions

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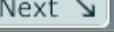
Notes

Slide 6 - Simulation

Simulation

Creating an Interim Recertification Transaction

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

Next 

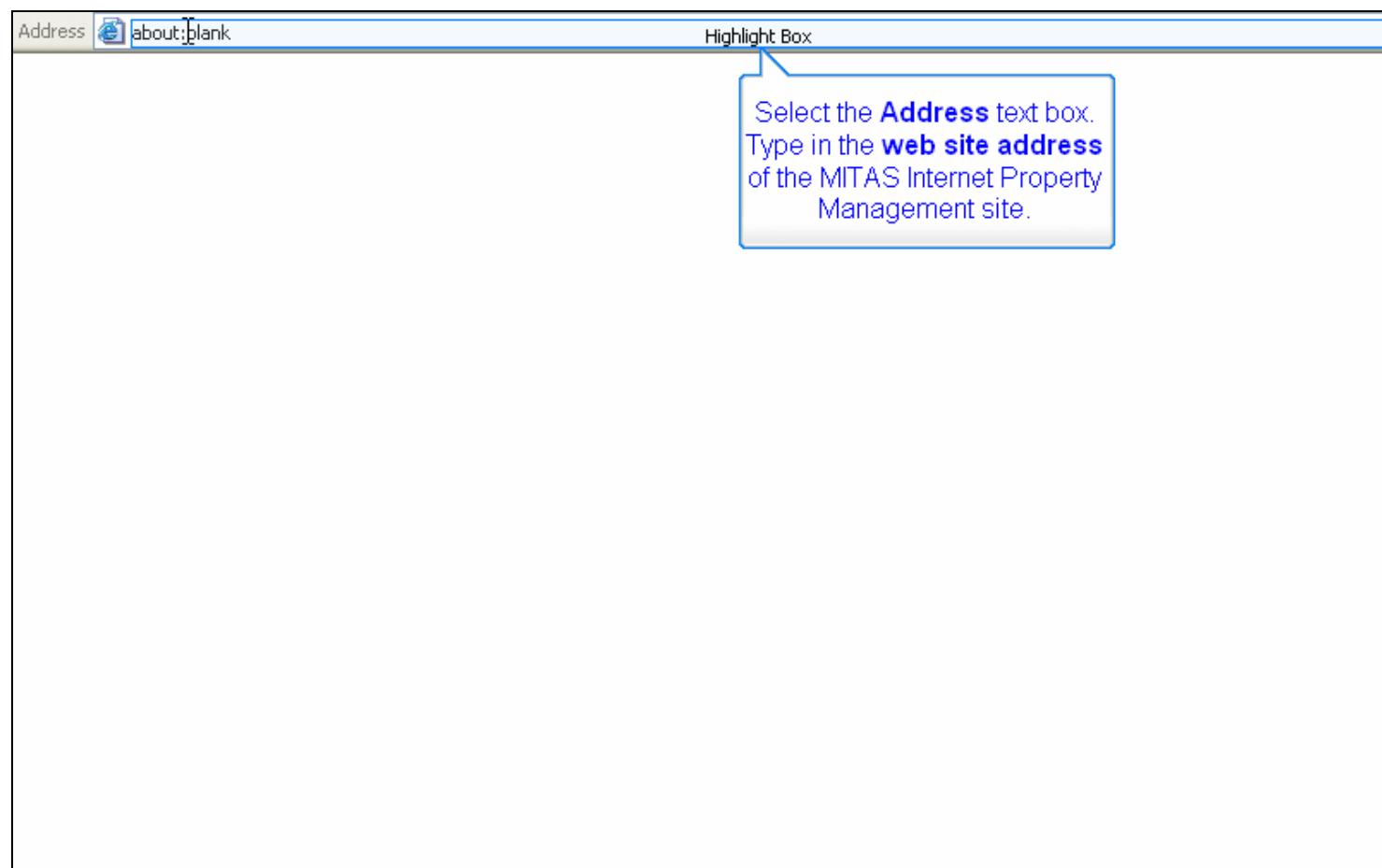
Text Captions

Simulation**Creating an Interim Recertification Transaction**

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

Notes

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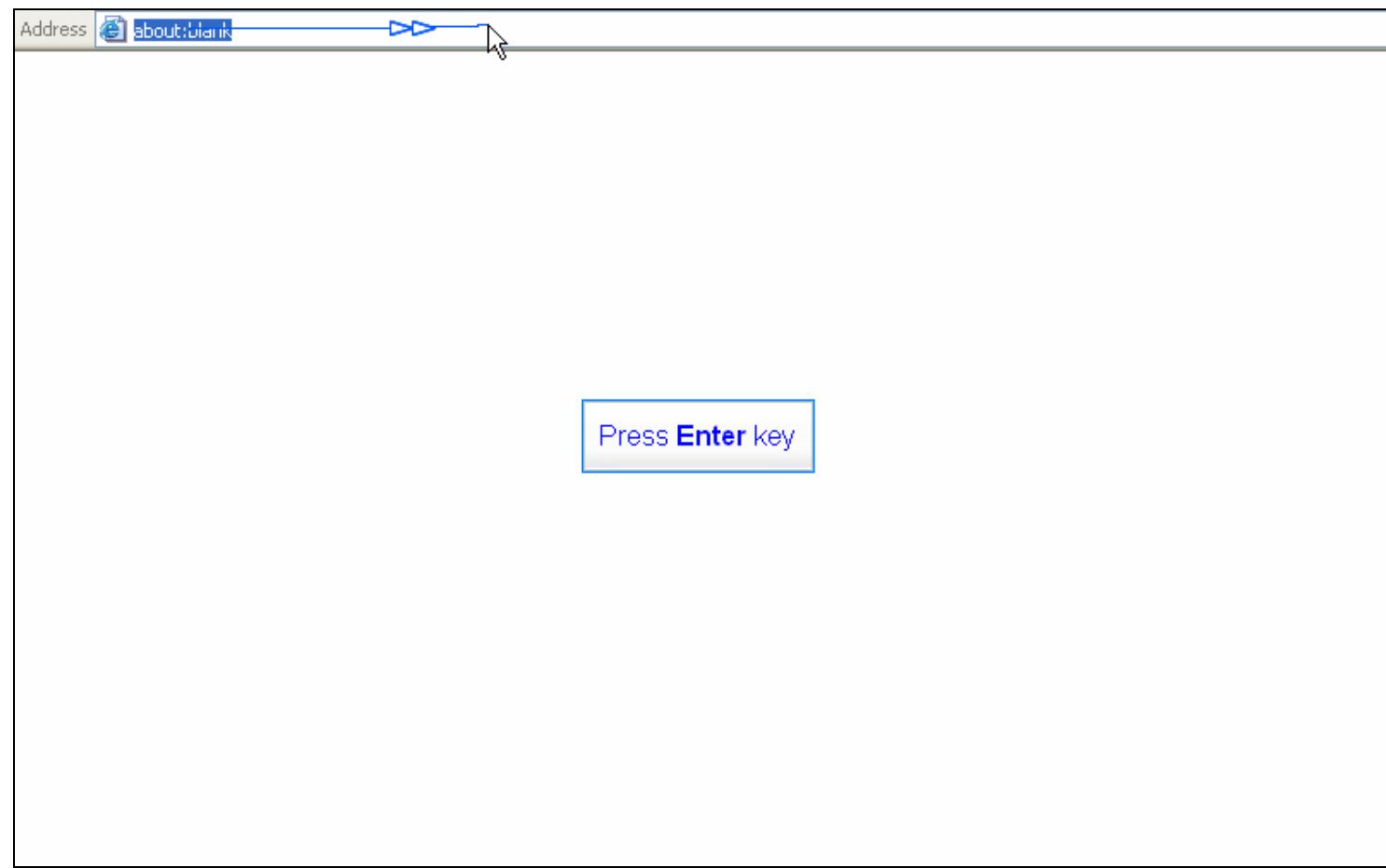


Text Captions

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

Notes

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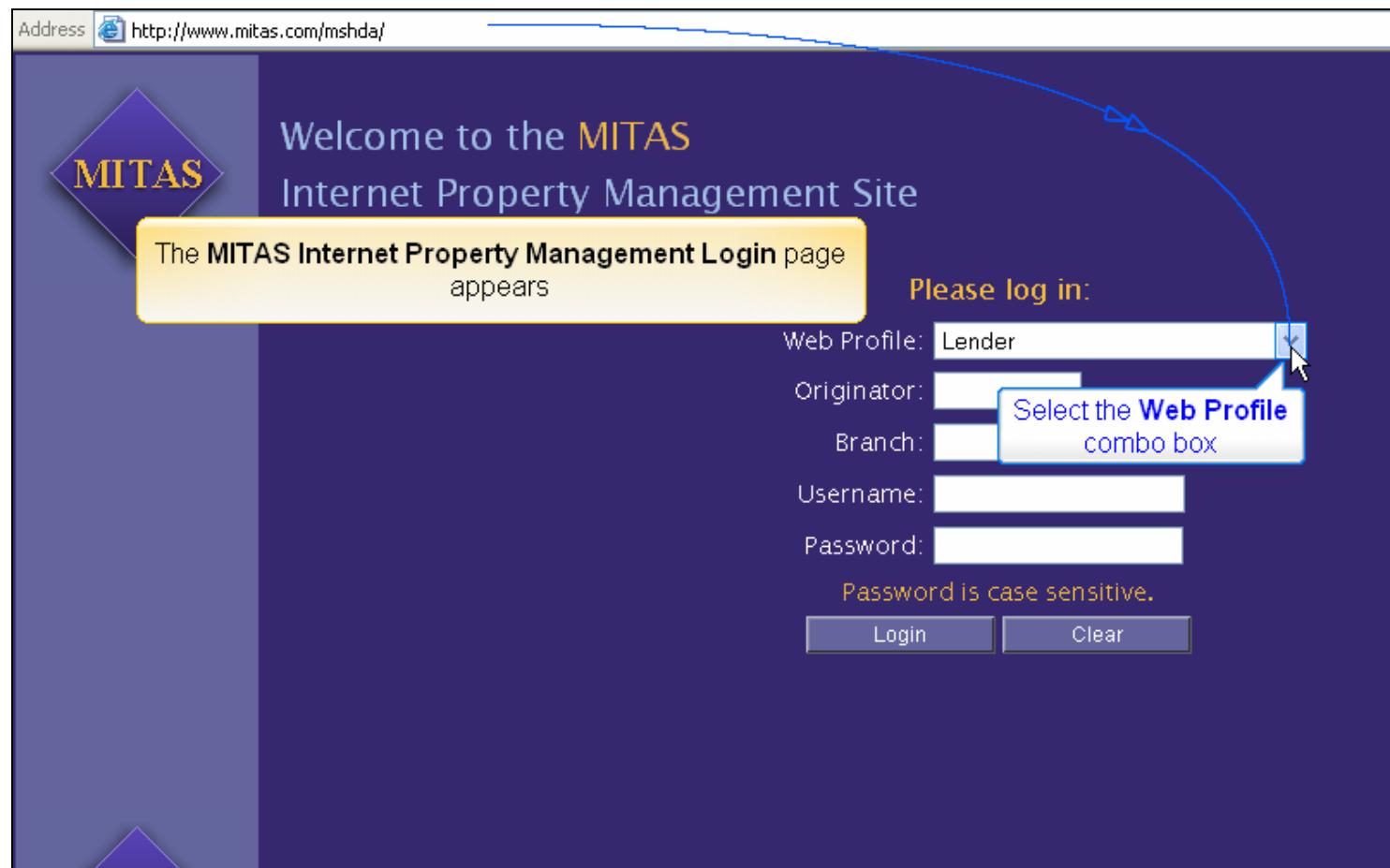


Text Captions

Press Enter key

Notes

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Text Captions

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

Select the **Web Profile** combo box

Notes

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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: Lender

Originator: Lender

Branch: Lender - Inquiry Only

Username: Issuer

Password: Issuer - Inquiry Only

Passwor: Broker

Passwor: Banker

Passwor: Government Agency

Passwor: Real Estate Agent

Passwor: Mortgagor

Passwor: Servicer

Passwor: Servicer - Inquiry Only

Passwor: Property Manager

Passwor: Administrator

Login

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

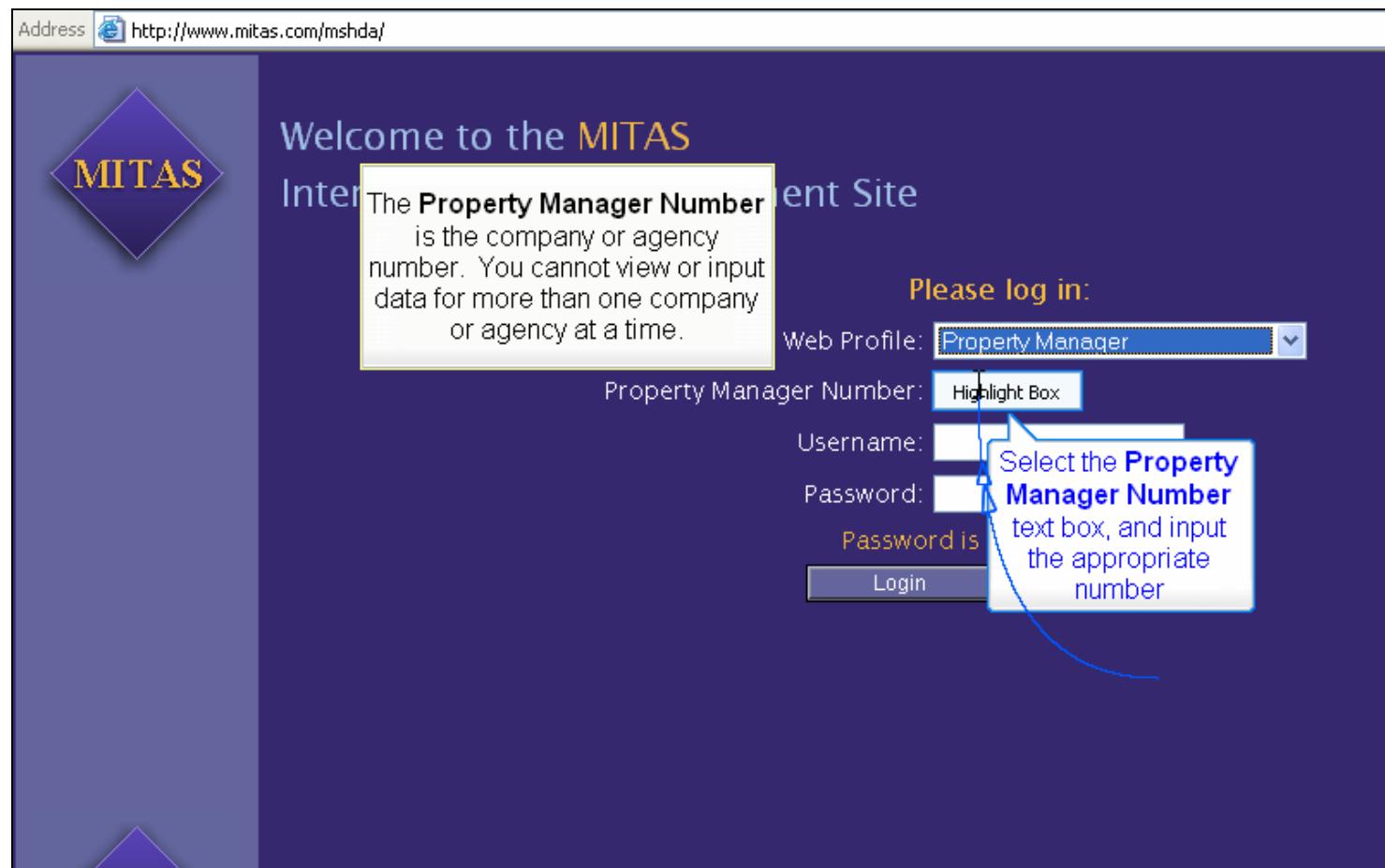
Text Captions

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

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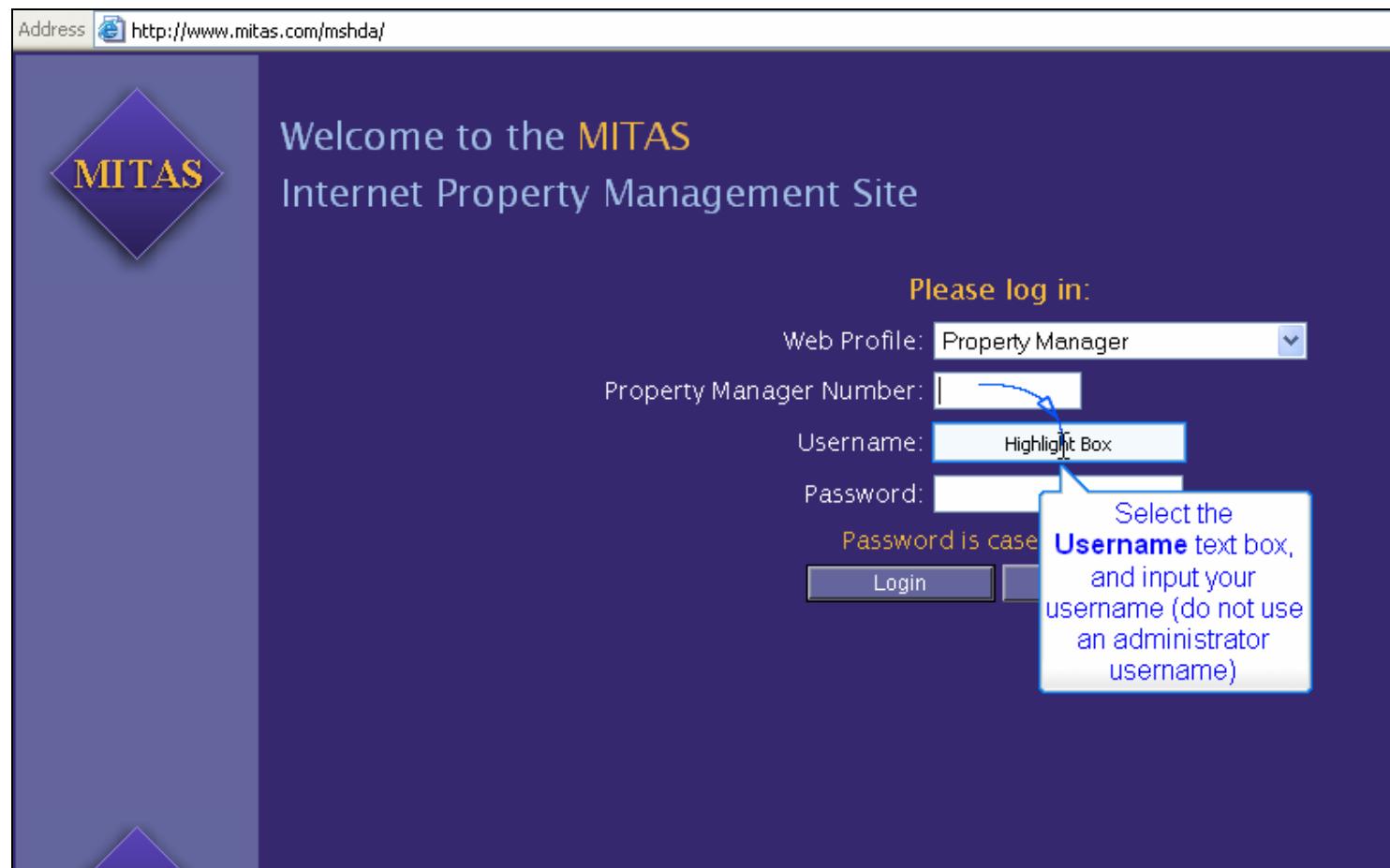
Text Captions

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

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Text Captions

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

Notes

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The image shows a screenshot of the MITAS Internet Property Management Site login page. The address bar at the top shows the URL <http://www.mitash.com/mshda/>. The page features a large purple diamond logo on the left with the word "MITAS" in yellow. The main content area has a dark blue background with the text "Welcome to the MITAS Internet Property Management Site". Below this, a "Please log in:" message is displayed. The login form includes fields for "Web Profile" (set to "Property Manager"), "Property Manager Number" (set to "1"), "Username" (empty), and "Password" (empty). A note below the password field states "Password is case sensitive". A "Login" button is located to the right of the password field. A blue callout box with a yellow border and a blue arrow points to the "Password" text box, containing the text "Select the **Password** text box, and input your password".

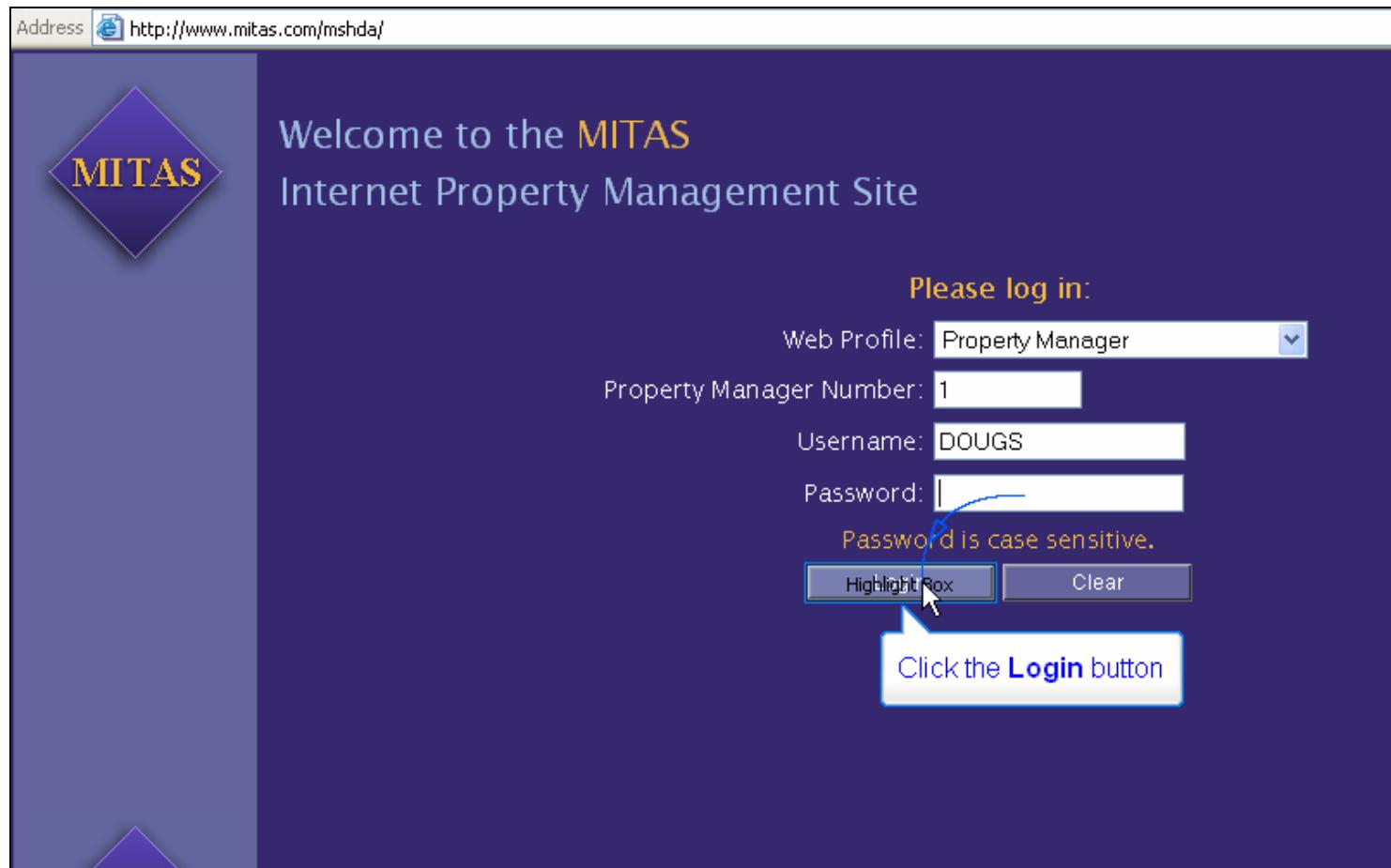
Text Captions

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

Notes

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



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

Please log in:

Web Profile: **Property Manager** 

Property Manager Number: **1**

Username: **DOUGS**

Password: **████████**

Password is case sensitive.

Highlight Box **Clear**

Click the **Login button**

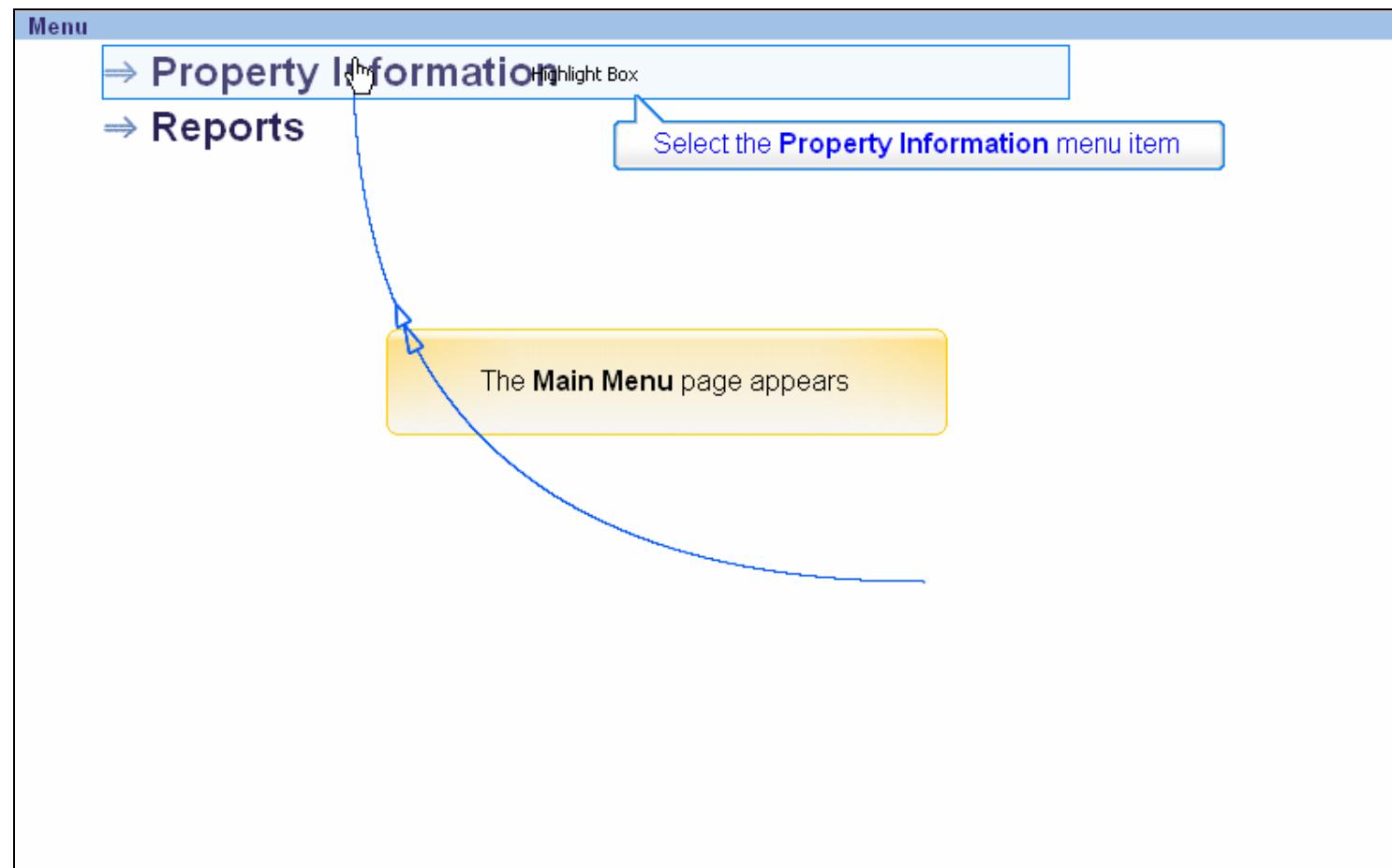
The screenshot shows a web browser window for the MITAS Internet Property Management Site. The address bar shows the URL. The main content area has a purple header with the MITAS logo and a purple body. It displays a login form with fields for Web Profile (Property Manager), Property Manager Number (1), Username (DOUGS), and Password (represented by a series of black bars). Below the password field is a note: "Password is case sensitive." At the bottom are two buttons: "Highlight Box" and "Clear", with a callout pointing to the "Highlight Box" button. A large blue callout box with a white border and blue text "Click the **Login** button" points to the "Login" button, which is highlighted with a blue border and a blue arrow pointing to it.

Text Captions

Click the **Login** button

Notes

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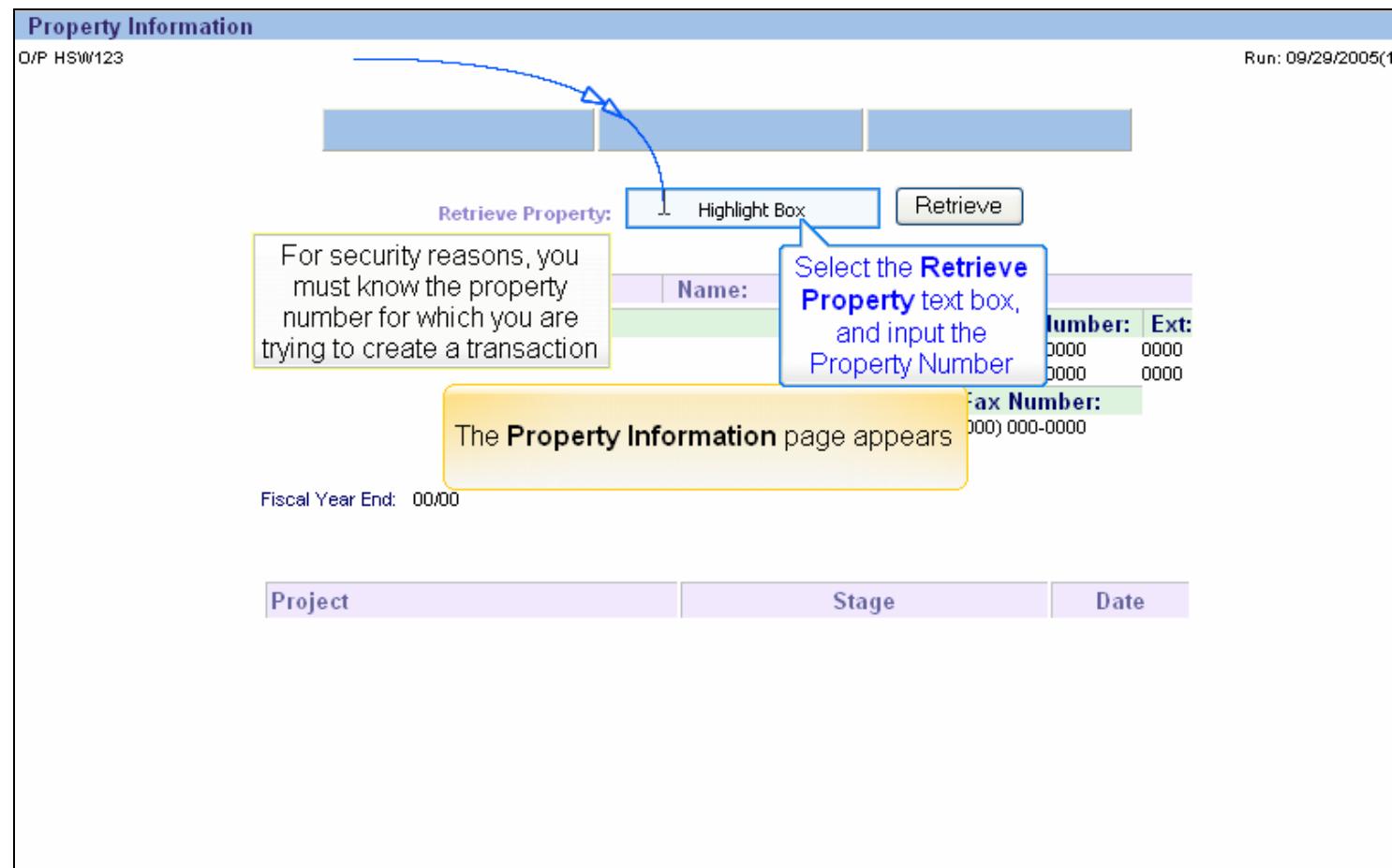
Text Captions

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)

Retrieve Property:

Property: 999999999999 Highlight Box

Property Address: Click the **Retrieve** button

Phone Number: (000) 000-0000 Ext: 0000
(000) 000-0000 Ext: 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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Property Information

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

Financials Financials Upload Transactions Transactions Upload Process Transactions Late Rec. Forms

Highlight Box
Buy Vac Check

Click the **Transactions** button to create an Interim Recertification transaction

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

Property: 75070 Name: MASON RIDGE
Property Address: MASON RIDGE LIVING Phone Number: Ext:
1500 CENTRAL (372) 547-6404 0000
MCKINNEY, TX 75070 (000) 000-0000 0000
Fax Number: (000) 000-0000

Fiscal Year End: 00/00

Project Stage Date

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 Interim Recertification transaction

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 Building 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			39874103	Corrected
07/15/2005			34433221	Corrected

The Transaction page appears

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Text Captions

The Transaction page appears

Select the Building combo box

Notes

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Move-In/Move-Out

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

Property: 75070 Name: MASON RIDGE

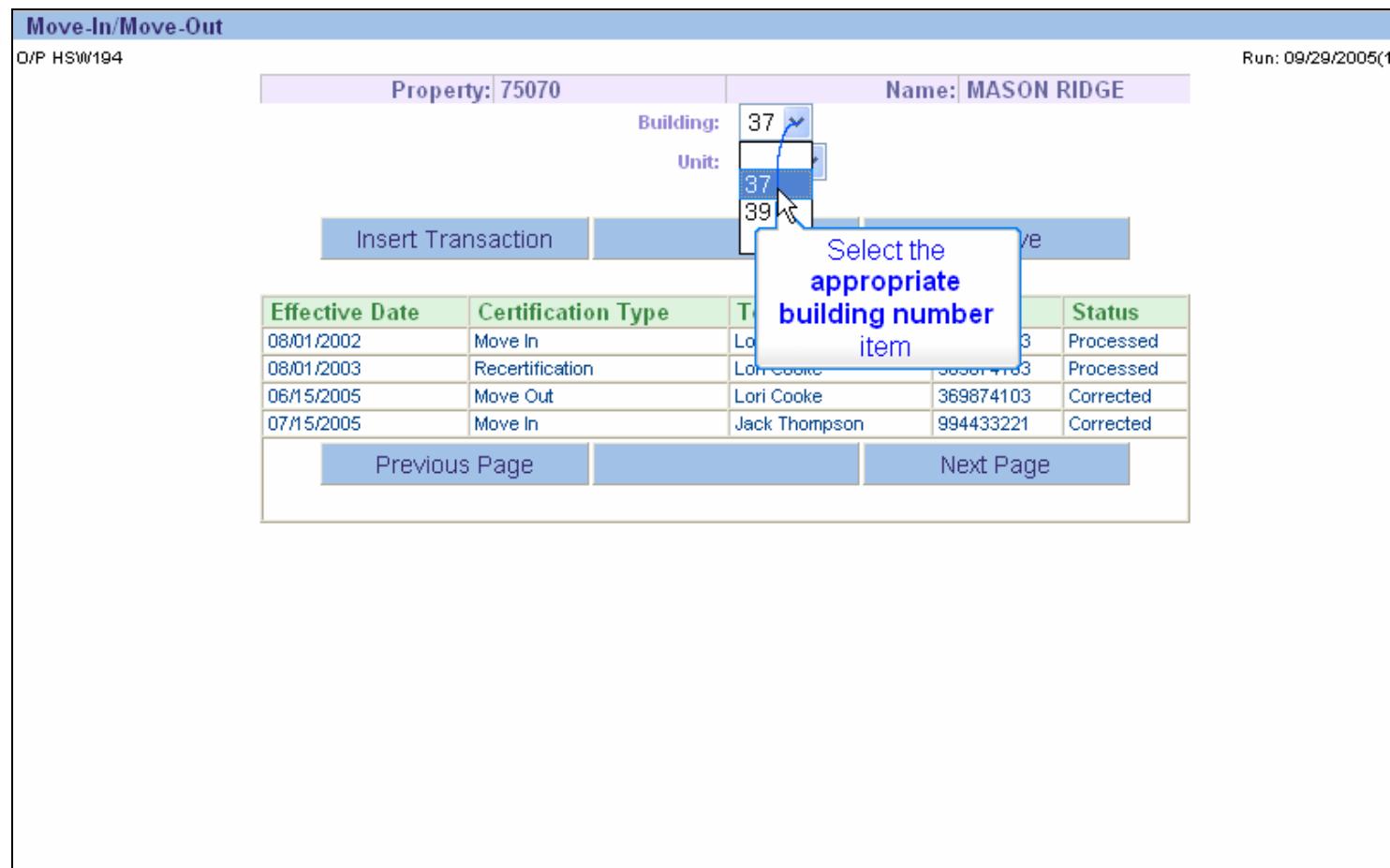
Building: 37
Unit: 37
39

Insert Transaction

Select the appropriate building number item

Effective Date	Certification Type	Trans. ID	Name	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

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Text Captions

Select the appropriate building number item

Notes

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Move-In/Move-Out

O/P HSW194

Property: 75070 Name: MASON RIDGE

Building: 37 Unit: 100

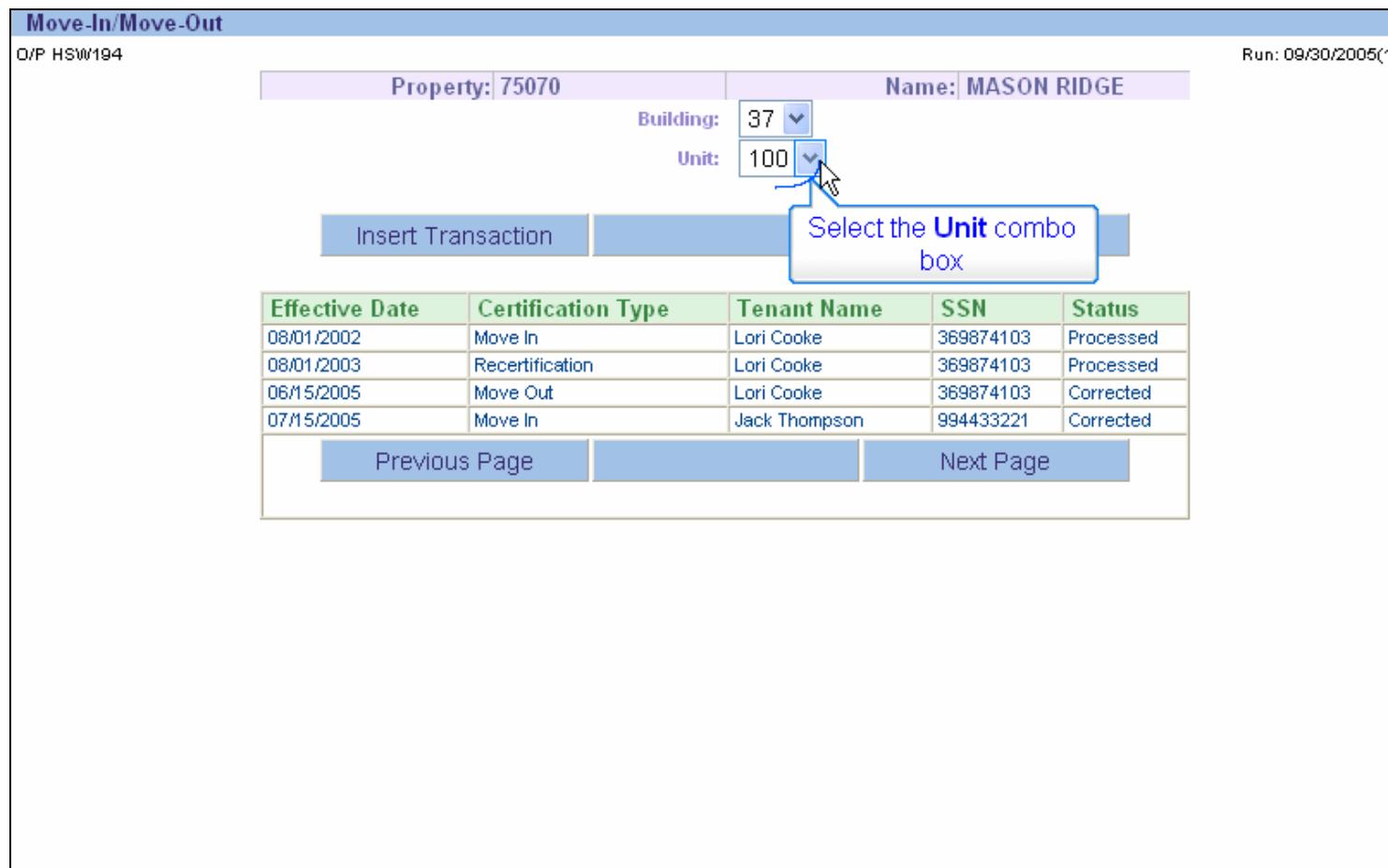
Run: 09/30/2005(1)

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

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Text Captions

Select the Unit combo box

Notes

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Move-In/Move-Out

O/P HSW194

Property: 75070 Name: MASON RIDGE

Building: 37

Unit: 100

100
101
105
111

Insert Transaction Retrieve

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

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Select the appropriate unit item

Text Captions

Select the appropriate unit item

Notes

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Move-In/Move-Out

O/P HSW194

Run: 09/30/2005(1)

Property: 75070	Name: MASON RIDGE	
Building: 37	Unit: 101	
Insert Transaction		
Retrieve Highlight		
Effective Date	Comments	Status
08/01/2002	Move Out	Processed
08/01/2003	Re	Processed
06/15/2005	Move Out	Corrected
07/15/2005	Move In	Jack Thompson 994433221 Corrected
Previous Page		Next Page

Text Captions

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

Notes

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Move-In/Move-Out

O/P HSW194

Run: 09/30/2005(1)

Property: 75070	Name: MASON RIDGE
Building: 37	Unit: 101

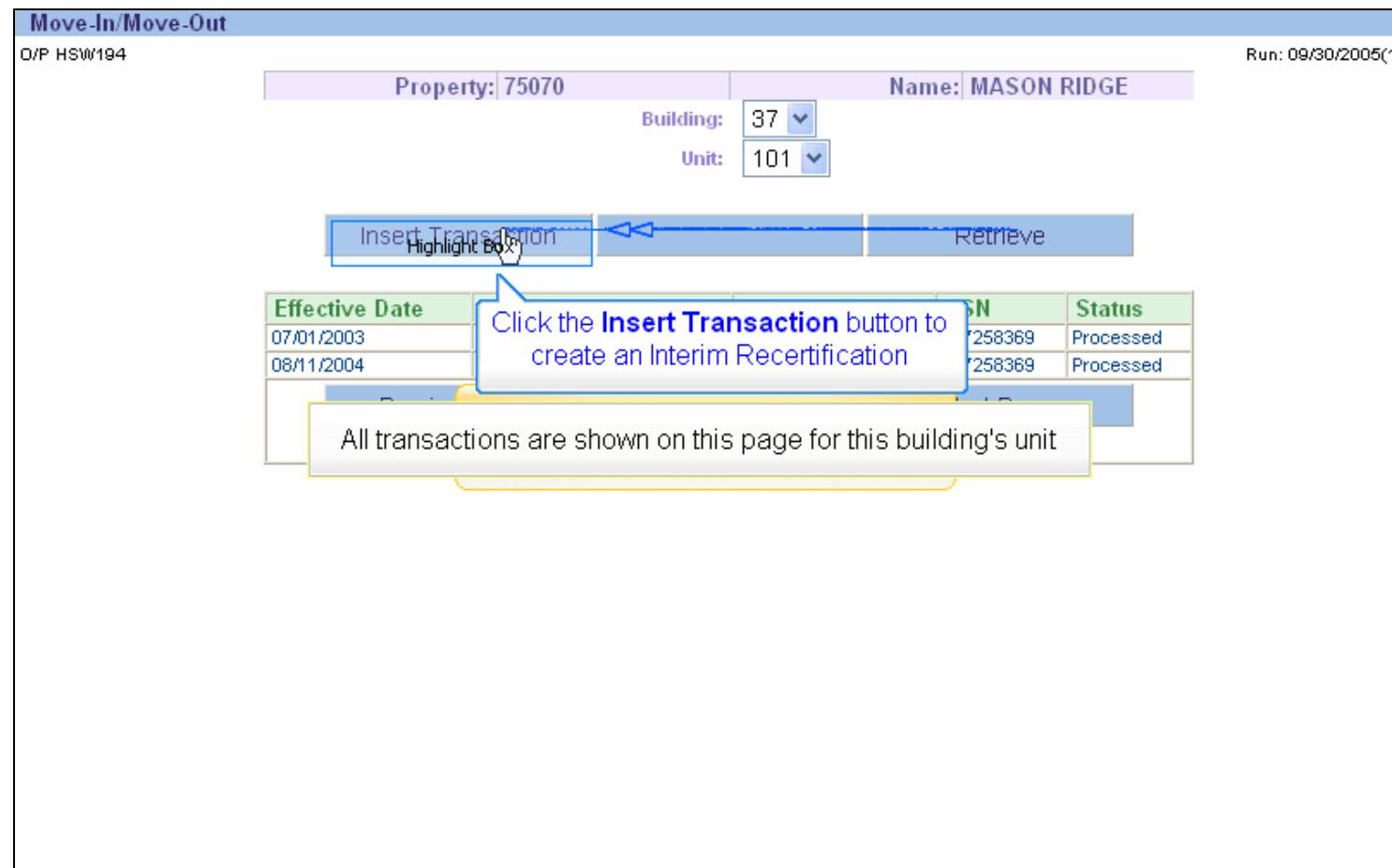
Insert Transaction Retrieve

Effective Date

07/01/2003	SN	Status
08/11/2004	7258369	Processed
	7258369	Processed

Click the **Insert Transaction** button to create an Interim Recertification

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



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 Interim Recertification transaction

Notes

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Move-In/Move-Out

O/P HSW194

Property: 75070 Name: MASON RIDGE

Building: 37 Unit: 101

Effective Date:

Certification Type:

Run: 09/30/2005(1)

An **Interim Recertification** should be used when there is a change in the tenant's eligibility for a program, such as a change in income, rent, or student status. The system will process the tenant information through the tenant compliance verifying tenant eligibility.

Note: An interim recertification is not the same as a recertification transaction. The annual certification requirement is not met by using an interim recertification transaction, and the next recertification date (annual due date) is not reset when using this transaction type. The annual certification is completed by using the Recertification transaction type.

Text Captions

The **Transaction Detail** (date and certification type) page appears

An **Interim Recertification** should be used when there is a change in the tenant's eligibility for a program, such as a change in income, rent, or student status. The system will process the tenant information through the tenant compliance verifying tenant eligibility.

Note: An interim recertification is not the same as a recertification transaction. The annual certification requirement is not met by using an interim recertification transaction, and the next recertification date (annual due date) is not reset when using this transaction type. The annual certification is completed by using the Recertification transaction type.

Select the **Effective Date** text box, and input the date of the interim recertification

Notes

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Move-In/Move-Out

O/P HSW194 Run: 09/30/2005(1)

Property: 75070	Name: MASON RIDGE
Building: 37	Unit: 101
Effective Date: <input type="text" value="MM/DD/YYYY"/>	
Certification Type: <input type="text" value="Move In"/>	
Please complete the following fields to create a transfer transaction.	
Transfer Building:	
Transfer Unit:	100 <input type="button" value="▼"/>
<input type="button" value="Submit"/>	

Select the **Certification Type** combo box

Text Captions

Select the **Certification Type** combo box

Notes

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Move-In/Move-Out

O/P HSW194 Run: 09/30/2005(1)

Property:	75070	Name:	MASON RIDGE
Building:	37	Unit:	101
Effective Date:	05/01/2005 (MM/DD/YYYY)		
Certification Type:	Move In		
Please complete the following fields to create a transfer transaction.			
Transfer Building:	Move In	Move Out	Unit Transfer
Transfer Unit:	Recertification	Interim Recertification	Initial Certification

Select the **Interim Recertification** item



Text Captions

Select the **Interim Recertification** item

Notes

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Move-In/Move-Out

O/P HSW194 Run: 09/30/2005(1)

Property: 75070	Name: MASON RIDGE
Building: 37	Unit: 101
Effective Date: 05/01/2005 (MM/DD/YYYY)	
Certification Type: Interim Recertification	

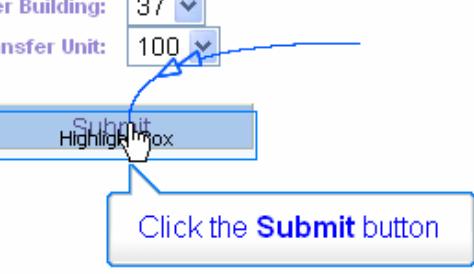
Please complete the following section if inserting Unit Transfer transaction.

Transfer Building: 37

Transfer Unit: 100

Submit

Click the **Submit** button



Text Captions

Click the **Submit** button

Notes

Slide 37 - Slide 37

Move-In/Move-Out

O/P HSW194 Run: 09/30/2005(1)

Property: 75070	Name: MASON RIDGE
Building: 37 Unit: 101 Effective Date: 05/01/2005 Certification Type: Interim Recertification	
Tenant	Family Members
Submit	

TENANT INFORMATION

Verify the tenant information updating the pertinent tenant income, rent, and/or student status changes, and inputting any missing information

Income: Over Income

Income Source: W Other

Race: Black/African American

Date of Birth: 08/26/2000

No Family Members: 1

Student: No Yes Yes & Qualify

Handicapped:

Temp ABS HH:

Special Needs:

Live In Aid:

Homeless:

For example, if the tenant income changed, select the **Income** text box, and input the tenant's new income amount

Text Captions

The **Transaction Tenant Information** page appears

Verify the tenant information updating the pertinent tenant income, rent, and/or student status changes, and inputting any missing information

For example, if the tenant income changed, select the **Income** text box, and input the tenant's new income amount

Notes

Slide 38 - Slide 38

Move-In/Move-Out

O/P HSW194 Run: 09/30/2005(1)

Property: 75070	Name: MASON RIDGE
Building: 37 Unit: 101 Effective Date: 05/01/2005 Certification Type: Interim Recertification	
Tenant	Family Members
<input style="background-color: #0070C0; color: white; font-weight: bold; font-size: 10pt; width: 100%; height: 100%;" type="button" value="Submit"/>	

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

Income: 7, Over Income
Income Source: W Other/Non-Federal Wage
Race: Black/African American Hispanic or Latino
Date of Birth: 08/26/2003 (MM/DD/YYYY)
No Family Members: 1 Number of Children: 1
Student: No Yes Yes & Qualify
Handicapped: Live In Aid:
Temp ABS HH: Homeless:
Special Needs:

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

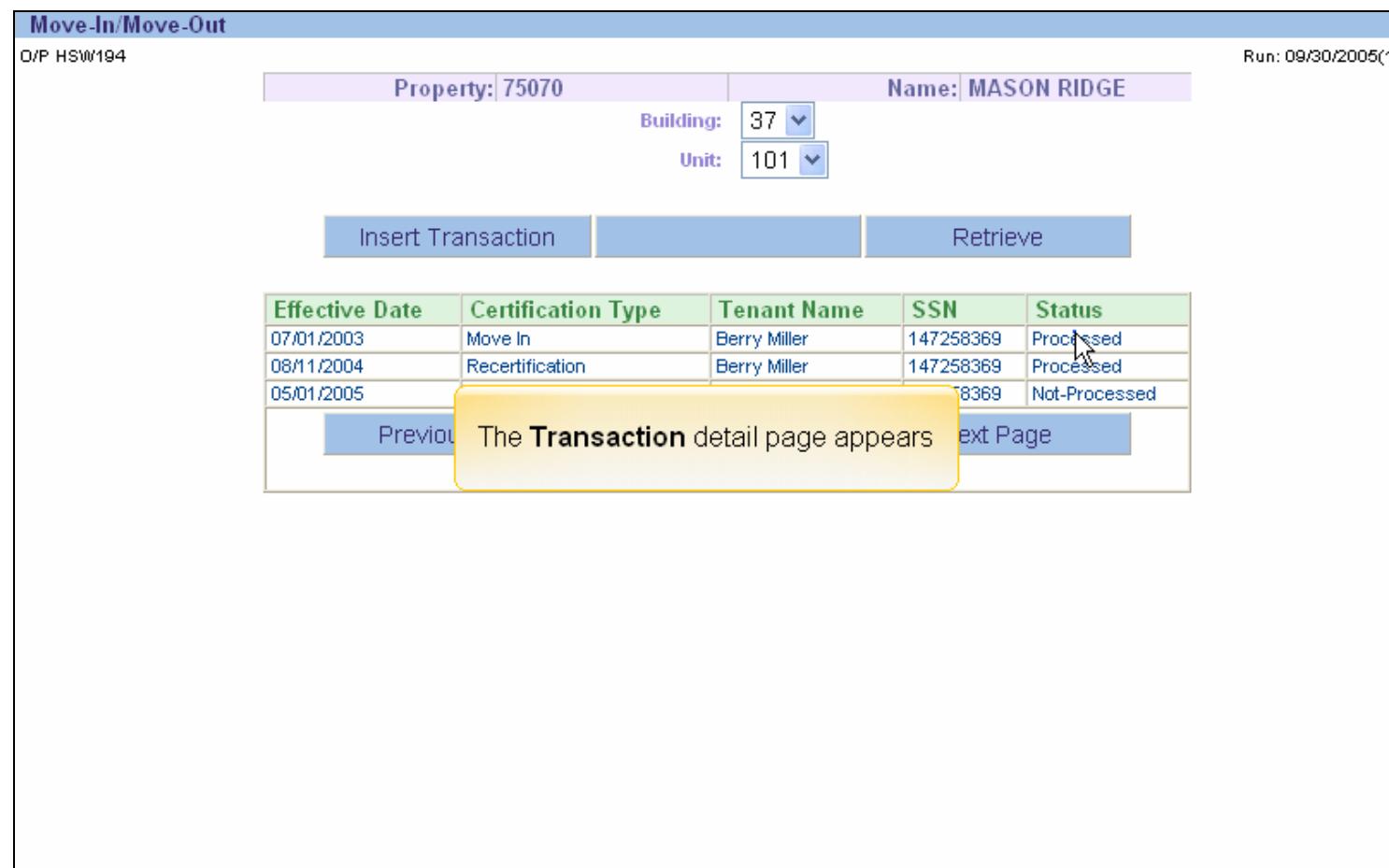
Run: 09/30/2005(1)

Property: 75070	Name: MASON RIDGE
Building: 37	Unit: 101

Insert Transaction Retrieve

Effective Date	Certification Type	Tenant Name	SSN	Status
07/01/2003	Move In	Berry Miller	147258369	Processed
08/11/2004	Recertification	Berry Miller	147258369	Processed
05/01/2005			78369	Not-Processed

Previous The **Transaction** detail page appears Next Page



Text Captions

The **Transaction** detail page appears

Notes

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Move-In/Move-Out
O/P HSW194

Effective Date	Certification Type	Tenant Name	SSN	Status
07/01/2003	Move In	Berry Miller	147258369	Process
08/11/2004	Recertification	Berry Miller	147258369	Process
			147258369	Not-Proc

Insert Transaction Retrieve

Effective Date Certification Type Tenant Name SSN Status

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

Next Page

MITAS

Screens
Move-In/Move-Out

Options
Back
Submit

Main Menu
System Help
Screen Help
Logoff

Click the Logoff button to log off the system

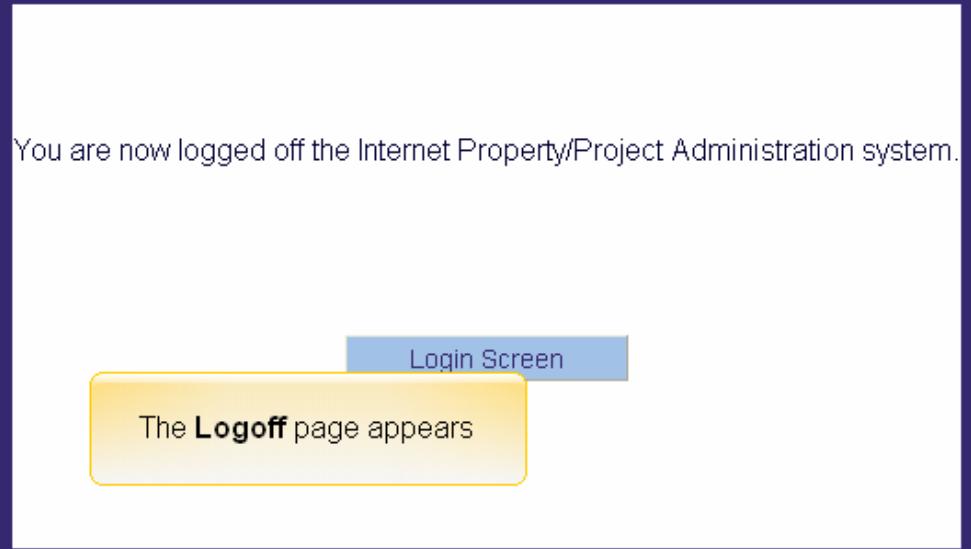
Text Captions

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.

Login Screen

The **Logoff** page appears

Text Captions

End of simulation

The **Logoff** page appears

Notes

Slide 44 - End

Congratulations!
You have completed Creating an Interim Recertification

Text Captions

Congratulations!
You have completed Creating an Interim Recertification

Notes