

Rent Roll Portal User Guide

For Borrowers & Compliance Contacts

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Portal User Requirements

We recommend using Google Chrome, Mozilla Firefox, Microsoft Edge, or Apple Safari.



Internet Explorer is not supported.



Terms Explained

Borrower vs Compliance contact

Borrower: If you are a Borrower, then you are the person ultimately responsible for the property's compliance, but may not deal directly with creating and uploading rent rolls. You will receive an account setup email, and property invitation emails for each property you are responsible for, directly from the City of San Jose. These property invitation emails can then be forwarded to compliance contacts, who will perform many of the more detailed compliance tasks.

Compliance contact: If you are a compliance contact, then you are the person responsible for creating and submitting rent rolls and should be receiving a forwarded property invitation email from the Borrower for each property you are responsible for overseeing.



User Account

This section will cover the following:

- **Creating an Account**
 - **Account Login**
 - **Forgotten Username**
 - **Forgotten Password**
-
-

Creating an Account

Please reference the “terms explained” section to determine your status before proceeding.

Borrowers Only

Borrower Email Invitations

- You should have received an email from the City of San Jose with the subject title “**CSJ Rent Roll Portal: Account Setup**” which contains a list of the properties you are responsible for and a link to set up your account.

You are not required to set up an account, but if you choose to do so, then you must use the link from this “account setup” email only. Do not use a link from a “property invitation” email.

- For each property in your list, you will receive an additional email with the subject title “**CSJ Rent Roll Portal: Property Invitation.**” Each property invitation is tied to a specific property, and must be forwarded to the compliance contact responsible for completing and submitting rent rolls for that property. You will be sent a confirmation email each time a Compliance contact has signed up to oversee one of your properties.

For example: if you receive 4 property invitation emails, then you must forward all 4 emails to the compliance contact(s) overseeing each of those properties. Each email represents a different property that must be linked to the compliance contact's account in order for them to successfully upload that property's rent roll.

- If you plan on submitting the rent rolls yourself, please disregard the property invitations. These are only for compliance contacts to use. Once you set up your account using the “**CSJ Rent Roll Portal: Account Setup**” email link, all of your properties will already be linked to your account.

Borrower Deadlines

- **Borrowers** have 5 days to sign up for their own account using the “CSJ Rent Roll Portal: Account Setup” email, before the account invitation link expires.
- **Compliance contacts** have 5 days to sign up using the property invitation emails they receive before those links expire, so please forward them to your compliance contacts in a timely manner.

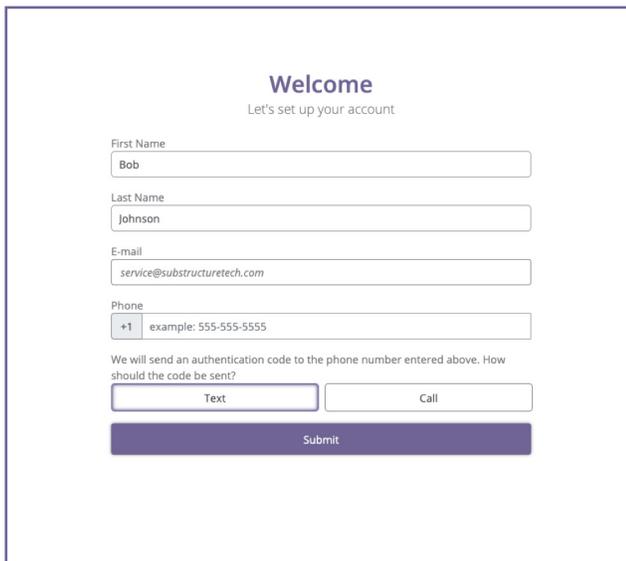
Borrower Step by Step Instructions

1. If you decide to create an account for yourself, your name and email address will be automatically filled out on the account setup page. You will be able to change this information later if need be. Refer to the “Edit Profile” section for more information on how to do this.
2. You are required to register a phone number for 2 factor authentication. This is because the portal contains sensitive information that needs to be kept secure.
3. Enter your “two-factor” authentication code that is received via SMS or phone call and submit.
4. Once you have authenticated your information, create a password.

Once your password has been created, you will receive another email with a confirmation of signup, subject title “**CSJ Rent Roll Portal Registration Complete.**” This email will contain an auto-generated username that you will need in order to sign in to the portal. **Please do not delete this email*** It is important to keep a record of your username.**

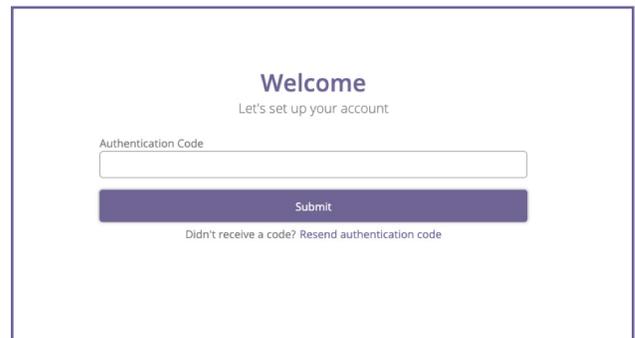
You will use this username, password, and phone number to access your account moving forward.

(1 & 2)



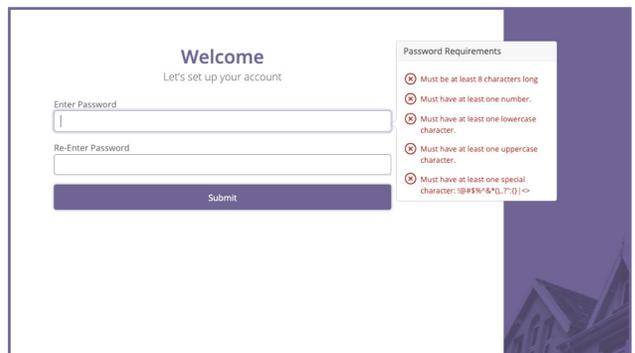
If you decide to create an account for yourself, your name and email address will be automatically filled out.

(3)



Enter your authentication code that is received via SMS or phone call and submit.

(4)



Once you have authenticated your information, create a password.

Compliance Contacts Only

Compliance contact Email Invitations

- You should have received a forwarded email from your Borrower with the subject title “**CSJ Rent Roll Portal: Property Invitation.**” This email allows you to add a property to your account.

You may be receiving multiple property invitations. This is because each property needs to be added individually to your account using that specific link in the property invitation email. Each property invite has its own unique invitation that is tied to a specific property.

- Please use this “property invitation” link forwarded to you to set up your account if you do not already have one. If you do already have an account and need to add a property to it, please use the link in the property invitation email to login. This will tie that property to your account.

For example: If you as a compliance contact have 4 different properties that you will be responsible for, then you will need to click the link from each of those 4 different property invitation emails and log in to the system each time, so that each property can be tied to your account.

- The Borrower will be notified each time you set up a property on your account using the property invitation email link that was forwarded to you.

Compliance contact Deadlines

Compliance contacts have 5 days to sign up before the property invitation link expires.

Compliance contact Step by Step Instructions

1. Once you have clicked on the email link, you will be directed to an account setup page where you will need to enter your name and contact information. You will be able to change this information later if need be. Refer to the “Edit Profile” section for more information on how to do this.
2. You are required to register a phone number for 2 factor authentication. This is because the portal contains sensitive information that needs to be kept secure.
3. Enter your authentication code that is received via SMS or phone call and submit.
4. Once you have authenticated your information, create a password.

Once your password has been created, you will receive another email with a confirmation of signup, subject title “**CSJ Rent Roll Portal Registration Complete.**” This email will contain an auto-generated username that you will need in order to sign in to the portal. **Please do not delete this email*** It is important to keep a record of your username.**

You will use this username, password, and phone number to access your account moving forward.

(1 & 2)

Welcome
Let's set up your account

First Name

Last Name

E-mail

Phone

We will send an authentication code to the phone number entered above. How should the code be sent?

[Already have an account? Login Here](#)

Once you have clicked on the email link, you will be directed to an account setup page where you will need to enter your name and contact information. If you already have an account, simply click “Login Here” to login and connect the property to your account.

(3)

Welcome
Let's set up your account

Authentication Code

[Didn't receive a code? Resend authentication code](#)

Enter your authentication code that is received via SMS or phone call and submit.

(4)

Welcome
Let's set up your account

Enter Password

Re-Enter Password

Password Requirements

- ⊗ Must be at least 8 characters long
- ⊗ Must have at least one number.
- ⊗ Must have at least one lowercase character.
- ⊗ Must have at least one uppercase character.
- ⊗ Must have at least one special character: @#%&*^!_.,:;{}|<>

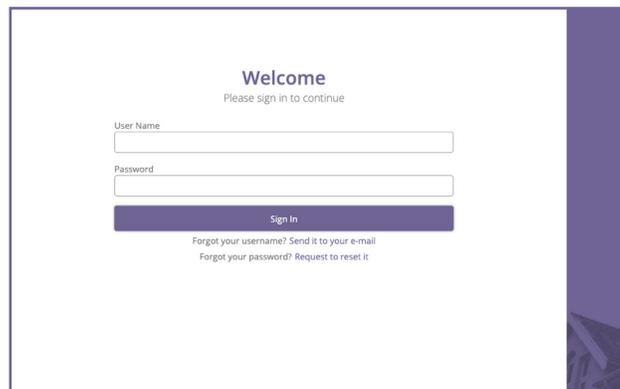
Once you have authenticated your information, create a password.

Account Login

Step by Step Instructions

1. Once an account has been created, navigate to the <https://sanjose.dataportal.city/> to login to the Rent Roll Portal
2. Enter your username and password, then proceed.
3. You will be sent an authentication code to the phone number you entered during sign up. The authentication code can be sent via text or phone call, whichever is preferred
4. Enter the authentication code to complete the login process.

(1 & 2)



Welcome
Please sign in to continue

User Name

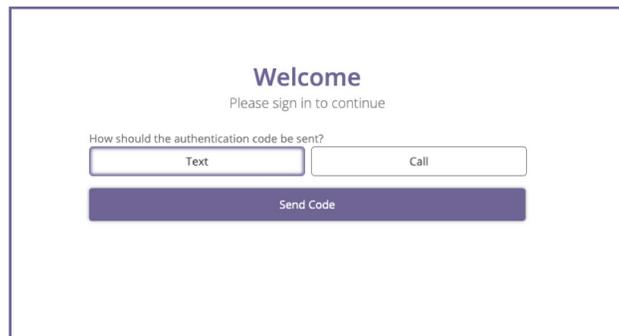
Password

Sign In

[Forgot your username? Send it to your e-mail](#)
[Forgot your password? Request to reset it](#)

Navigate to portal website and sign in with username & password.

(3)



Welcome
Please sign in to continue

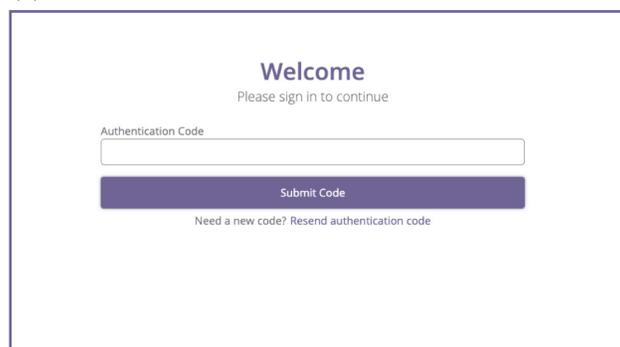
How should the authentication code be sent?

Text Call

Send Code

Choose how you want your authentication code to be sent. It will be sent to the phone number you entered during sign up.

(4)



Welcome
Please sign in to continue

Authentication Code

Submit Code

[Need a new code? Resend authentication code](#)

Enter your authentication code to complete to login process.

Forgotten Username

If you've forgotten your username, there are two easy ways to locate this information...

First, try to locate the email confirmation you received after you signed up for an account, subject title **"CSJ Rent Roll Portal Registration Complete."** This email contains your username.

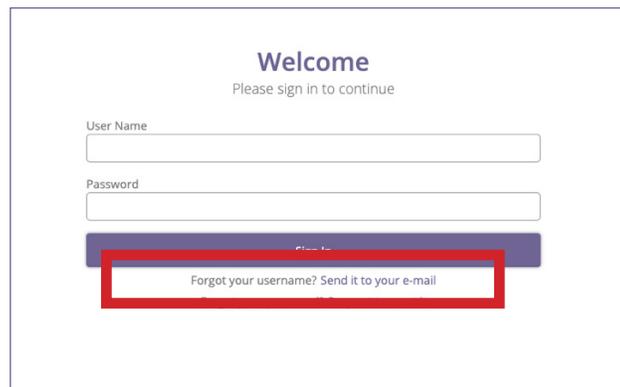
If this email has been deleted, then follow these easy steps to recover your username:

Step by Step Instructions

1. Navigate to <https://sanjose.dataportal.city/>
2. Locate the "Forgot your username?" label below the "Sign In" button
3. Click "Send it to your email" and you will be prompted to enter your email associated with the account.
4. Enter email and click "submit"

If a username is associated with the email address you entered, then the username information will be sent to that email. Make sure to use the correct email that was used to register your account! Otherwise no email will be sent.

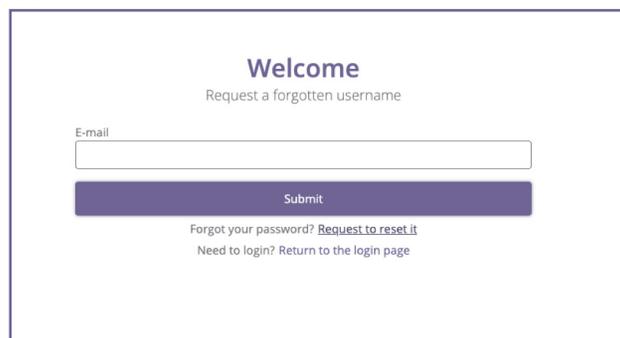
(1-3)



The screenshot shows a login page titled "Welcome" with the subtitle "Please sign in to continue". It features two input fields: "User Name" and "Password". Below these fields is a dark blue "Sign In" button. A red rectangular box highlights a link below the button that reads "Forgot your username? Send it to your e-mail".

Navigate to portal website, locate "Forgot your username?" and click "Send it to your email."

(4)



The screenshot shows a page titled "Welcome" with the subtitle "Request a forgotten username". It features an "E-mail" input field. Below the input field is a dark blue "Submit" button. At the bottom of the page, there are two links: "Forgot your password? [Request to reset it](#)" and "Need to login? [Return to the login page](#)".

Enter email and click "Submit." Check your email.

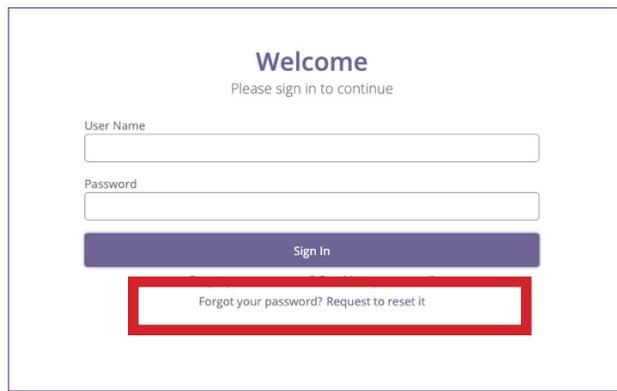
Forgotten / Updating Password

Step by Step Instructions

1. Navigate to <https://sanjose.dataportal.city/>
2. Locate the “Forgot your password?” label below the “Sign In” button
3. Click “Request to Reset it” and you will be prompted to enter your username
4. Enter your username and click “submit”

Once submitted, you will receive an email with instructions of how to reset your password, to the email address associated with your account. Click on the link in this email to create a new password for your account.

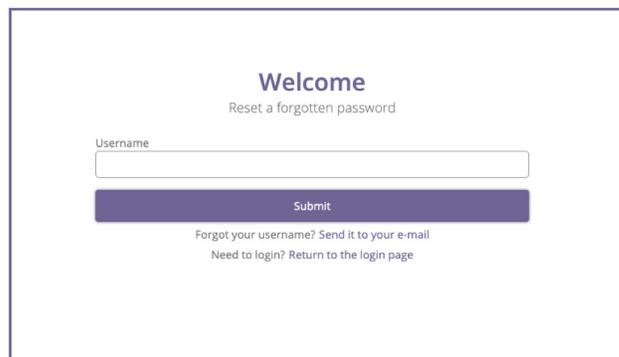
(1-3)



The screenshot shows a login page titled "Welcome" with the subtitle "Please sign in to continue". It features two input fields: "User Name" and "Password". Below these fields is a purple "Sign In" button. A red rectangular box highlights the text "Forgot your password? Request to reset it" located below the "Sign In" button.

Navigate to portal website, locate “Forgot your password?” and click “Request to Reset it.”

(4)



The screenshot shows a password reset page titled "Welcome" with the subtitle "Reset a forgotten password". It features a single input field labeled "Username". Below the field is a purple "Submit" button. At the bottom of the page, there are two links: "Forgot your username? Send it to your e-mail" and "Need to login? Return to the login page".

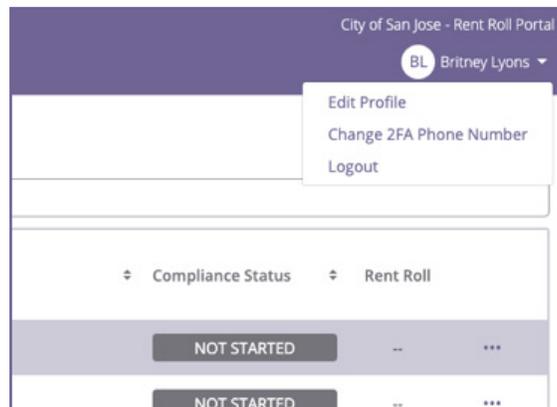
Enter your username and click “Submit.” Check your email.

Edit Profile Settings

Click on your name at the top right corner of the portal to edit your profile settings

From here you can do the following:

- **Edit Profile**
 - **Change 2FA Phone Number**
 - **Log Out**
-
-

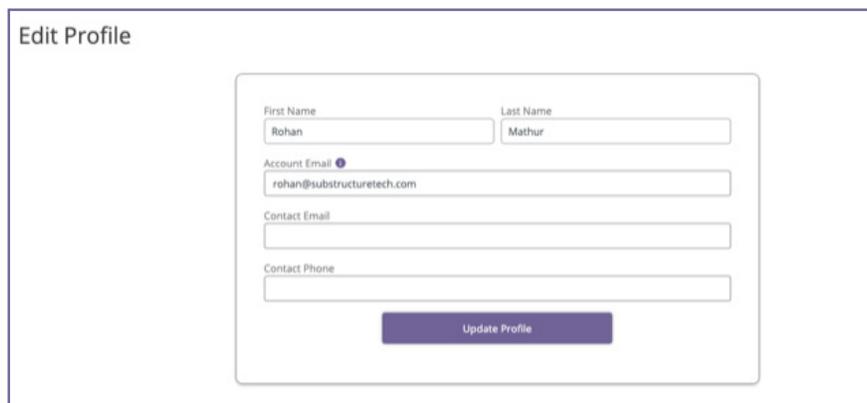


Edit Profile

You can change your first name, last name and account email here.

“Contact Email” and “Contact Phone” can be added for the City’s reference if you decide to add additional contact details here, but they are not required.

Please note* your “Account Email” is the method by which all communication from the Rent Roll Portal will be sent. Make sure this email is functional and you have access to it.

A screenshot of the 'Edit Profile' form. The form is titled 'Edit Profile' and contains several input fields: 'First Name' (with 'Rohan' entered), 'Last Name' (with 'Mathur' entered), 'Account Email' (with 'rohan@substructuretech.com' entered), 'Contact Email', and 'Contact Phone'. Below the fields is a purple 'Update Profile' button.

Change 2FA Phone Number

2FA stands for “Two-Factor Authentication.” This is the phone number that the authentication code will be sent to every time you login to the system.

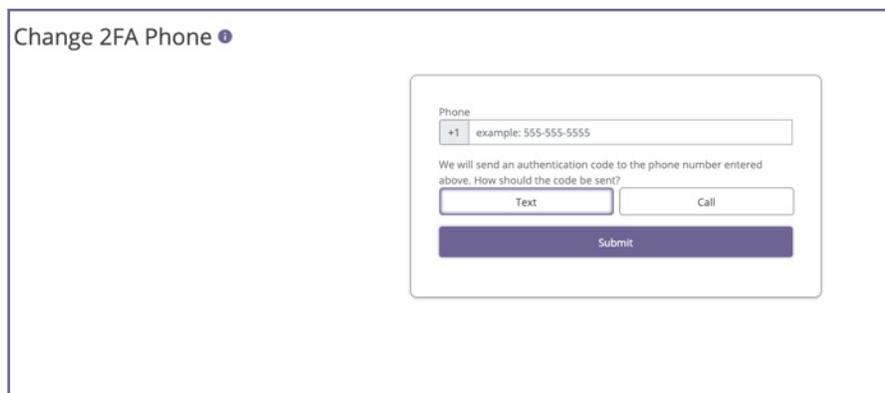
You will only need to click on this link if the phone number used for authentication needs to be changed.

Step by Step Instructions

1. To change the phone number, click on the “Change 2FA phone number” link and enter the new phone number on the page.
2. Pick your preferred send method, and click submit.
3. You will be sent an authentication code to your new phone number that must be entered in this screen in order to confirm the phone number change.

Once this is complete, the authentication codes will be sent to this new phone number during the login process moving forward.

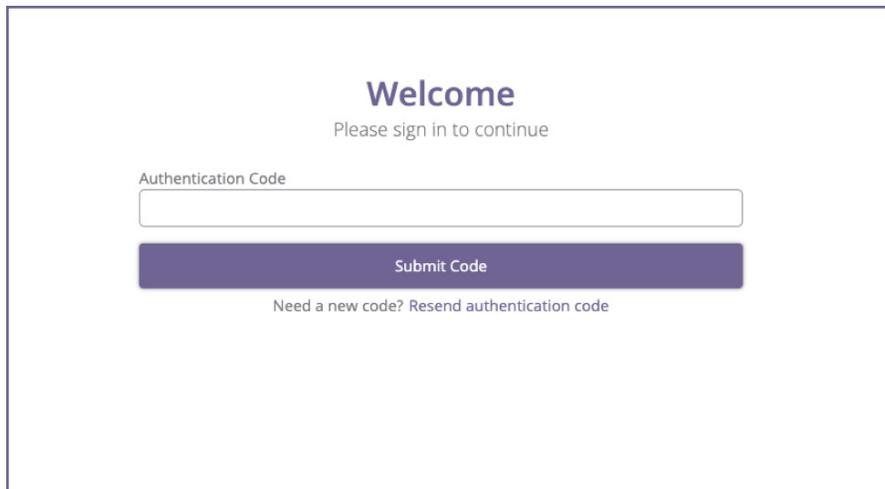
(1 & 2)



The screenshot shows a web form titled "Change 2FA Phone" with a help icon. It contains a "Phone" input field with a dropdown menu showing "+1" and "example: 555-555-5555". Below the input field is a question: "We will send an authentication code to the phone number entered above. How should the code be sent?". There are two buttons: "Text" and "Call". At the bottom of the form is a large blue "Submit" button.

To change the phone number, click on the “change 2FA phone number” link and enter the new phone number on the page. Pick your preferred send method, and click submit.

(3)



The screenshot shows a "Welcome" screen with the text "Please sign in to continue". It features an "Authentication Code" input field and a large blue "Submit Code" button. Below the button is a link that says "Need a new code? Resend authentication code".

Enter your authentication code and click “Submit Code” to confirm the phone number change.

Properties List Page

From the Properties page, you can view a list of all the properties that are tied to your account. Here you can see the compliance status for each property as well as the rent rolls for those properties, once they've been uploaded.

Compliance Status

Each property can have 4 different statuses:

- **Complete:** nothing needs to be done, rent roll has been uploaded & it's compliant
- **In Progress:** a rent roll has been uploaded, but it's not yet compliant
- **Not Started:** a rent roll has not been uploaded for this property
- **CSJ Action:** the property is missing some piece of information that the City needs to update before you can upload the rent roll. ***Please note, If you try to upload a rent roll with this status, you will not be able to.**

To view more details on the property and compliance status, either click on the property name or the 3 dots to the far right of each property row.

City of San Jose - Rent Roll Portal
RM Rohan Mathur

Properties Reference Data

Properties

Search by Property Name, Address, Developers Filters

Development Specialist	Property Name	Address	Developers	Compliance Status	Rent Roll
--	Sunshine Apartments	430 West Harbor Avenue	Rodgers Development Corporation	COMPLETE	View ...
--	Modern Luxury Condos	321 East Gooding Road	West Coast Development Company	IN PROGRESS	View ...
--	The Villas	720 South Cape Street	The Miracle Housing Company	NOT STARTED	-- ...
--	Ocean Breeze Apartments	111 North San Jacinto Boulevard	Fair Housing Corporation	COMPLETE	View ...

Property Details Pages

To see all the information & details about a property, you need to click on that property name from the Properties page, which lists all the properties on your account.

Here you can view:

- **Contact information** for the Development Specialist. This is the person at the City that is checking on the Property's compliance.
- **Compliance Requirements**, both Affordability Requirements & Utility Allowances for that property. This is for your reference only.
- **Unit Details** on all the units the City is checking compliance for. This is for your reference only.
- **Current Rent Roll**. You can view the current rent roll, upload a new rent roll, or get a template. If you are starting for the first time you can click the Rent Roll Wizard to get started.

The screenshot displays the 'Properties' page in the City of San Jose Rent Roll Portal. The header includes 'Properties', 'Reference Data', 'Users', and 'City of San Jose - Rent Roll Portal' with a user profile for Rohan Mathur. A 'Send property manager invite' link is visible in the top right. The main content area features a card for 'Sunshine Apartments' at 430 W. Harbor Ave, San Jose, CA, 95112. It lists the Development Specialist as Kristine Kane (kristine.kane@sanjoseca.gov, 408-975-4447) and the Property Manager as Karen Gill (sunshine@pmgt.com, (408) 177-1285). Other roles include Asset Manager Sharon Sanders (ssanders@pmgt.com, (408) 176-1287) and Compliance Manager Erika Peters (epeters@pmgt.com, (408) 176-1262). Below this, the 'Compliance Requirements' section shows Affordability Requirements (HCD Inclusionary AR, HCD City Funded AR 20%) and Utility Allowances (Standard, Other - Other Electric/Lighting, Cooking - Electric, Heating - Electric). The 'Current Rent Roll' section shows a 'Rent Roll Status' of 'CSJ ACTION' with a progress bar and buttons for 'View', 'Upload', and 'Get Template'. A 'View rent roll wizard' link is also present. The 'Unit Details' section shows 'Total Restricted Units' as 88 and a bar chart for 'Bedroom Sizes' with 0 units for 0, 1, 3, and 4 bedrooms, and 14 units for 2 bedrooms, 28 units for 3 bedrooms, and 46 units for 4 bedrooms.

Click "View rent roll wizard" link to get started.

Rent Rolls

This section will cover the following:

- **Uploading**
 - **Assistance Completing**
 - **Navigating a Rent Roll Form**
 - **Error Types**
 - **Updating & Fixing Errors**
 - **Submitting**
-
-

Please note that rent rolls must be effective June 30th.

Uploading a Rent Roll

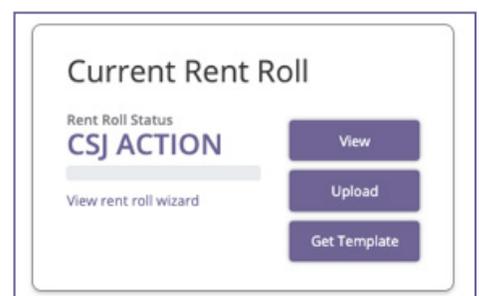
Rent Roll Template

You must download the rent roll template before you can upload a rent roll. This template will have unit number, bedroom count, and square footage for the property already filled out. **None of these should be changed.**

If you see any issues or incorrect information on the template, please reach out to the Development Specialist at the City who is assigned to the property, and they can correct the issue. You can find their contact information on the property page under “Development Specialist.”

Step by Step Instructions

1. To download the rent roll template, navigate to the property page and click “Get Template” under the “Current Rent Roll” section of the page. This will download the template for the specific property you are uploading a rent roll for.
2. Once you’ve downloaded the template, you can begin adding information for each of the units.
3. **Please note* if you have changed any of the unit numbers, bedroom count, or square footage from the template, the portal will not let you upload the rent roll.**
4. Upload the rent roll by clicking the “Upload” button under the “Current Rent Roll” section. The Rent Roll Wizard upload box will appear. Upload your rent roll here.
5. Once upload is complete, click on “View” from the Rent Roll Wizard upload screen to view the rent roll for errors.
6. If there are no errors, you will click “next” to view the rent roll and submit the certification of compliance. Please refer to the “Submitting a Rent Roll” section for more information.



If there are rent roll errors, those errors must be corrected before the rent roll can be submitted. Please refer to the “Updating a Rent Roll / Fixing Errors” section for further information on fixing rent rolls errors before submitting.

Assistance Completing a Rent Roll

Rent Roll Wizard

For assistance on what information is needed in each rent roll column, click on “View rent roll wizard” under the “Current Rent Roll” section. This will walk you through the process of filling out & uploading a rent roll.

Step by Step Instructions

1. Use the help of the Rent Roll Wizard to fill out your rent roll for the property.
2. Once you get to the section of the wizard that allows you to upload a rent roll, browse your computer for the rent roll you filled out and upload it here.
3. If there are no errors, click “View Rent Roll,” and you will see a “Submit” button on the left hand navigation of the rent roll page. Once you click this to submit the form, a window will appear confirming the “Certification of Compliance.”
4. If there are rent roll errors, those errors must be corrected before the rent roll can be submitted. Click “View rent roll” and correct the errors. You will see a “Re-Upload” option on the left hand navigation which you can use to re-upload the corrected rent roll. This will change to ‘Submit’ once all errors have been resolved. View the “Updating a Rent Roll / Fixing Errors” section for more information on how to fix these errors.

The portal will not let you upload a rent roll which has differing unit numbers, bedroom count, or square footage from the downloaded template.

If you need help understanding all the different parts of a rent roll page after it has been uploaded, please refer to the “navigating a rent roll form” section.

(1)

Unit	Number of Bedrooms	Square Footage
102	1	1010
103	2	1070
104	1	1020
105	0	880

Use the help of the Rent Roll Wizard to fill out your rent roll.

(2)

Browse your computer for the rent roll you filled out and upload.

(3)

If there are no errors, you will click “next” to view the rent roll and submit the certification.

(4)

If there are errors, you will click “next” to view and fix the rent roll before the rent roll can be submitted.

Navigating a Rent Roll Form

Left Hand Navigation Section

- Lists any errors that the rent roll has
- Gives you the option to re-upload or submit a rent roll
- Click on the name of the property to navigate back to the Property Page
- Click the “X” in the top right hand corner to hide the errors & view the rent roll

Rent Roll Form

- By default the rent roll is ordered by unit number
- Click any column name to sort by that column
- To pan across the rent roll vertically or horizontally, right click on the rent roll and drag your cursor over the page.
- To scroll up/down & left/right, click anywhere on the rent roll then use your arrow keys to navigate.

The screenshot shows the 'Sunshine Apartments' rent roll form. It features a main table with columns for Unit, Number of Bedrooms, Square Footage, CSJ AMI Level, HOMEUnit? No=0, Low=1, Hi=2, CSJ TIP Unit? 1=yes, 0=no, Tenant Head of Household, and Rent Subsidy. A left-hand navigation panel includes a 'Re-Upload' button and an 'Errors' section with a table of unit requirements. A tip at the bottom right states: 'TIP: hold right click and move mouse to pan across the rent roll table.'

Unit	Number of Bedrooms	Square Footage	CSJ AMI Level	HOMEUnit? No=0, Low=1, Hi=2	CSJ TIP Unit? 1=yes, 0=no	Tenant Head of Household	Rent Subsidy
104	2	1012	60	0	0	Kristine	\$1863.00
106	3	1105	60	0	0	Kristine	\$0.00
107	3	1105	30	0	0	Kristine	\$0.00
109	3	1105	60	0	0	Kristine	\$0.00
110	3	1105	60	0	0	Staff	
111	2	1012	60	0	0	Kristine	\$1942.00
112	2	1012	60	0	0	Kristine	\$2151.00
113	3	1105	60	0	0	Kristine	\$0.00
114	2	1012	60	0	0	Kristine	\$2144.00
119	1	741	50	0	0	Kristine	\$1659.00
121	2	1012	60	0	0	Kristine	\$1797.00
122	2	1012	60	0	0	Kristine	\$1873.00
123	2	1012	60	0	0	Kristine	\$1942.00
124	2	1012	60	0	0	Kristine	\$1873.00
125	1	741	50	0	0	Kristine	
126	2	1012	60	0	0	Kristine	
128	3	1105	60	0	0	Kristine	

Unit	Column
423	Date Last Certified
426	Date Last Certified

Rent Roll Error Types

There are 2 potential types of rent roll errors you may encounter:

1. Formatting Errors

2. Compliance Errors

a. Unit Requirement Errors

i. Max Rent Compliance

ii. Date Last Certified Compliance

b. Affordability Requirement Errors

1. Formatting Errors

If you hover over the cell in the errors table or in the rent roll, you will receive a message indicating how to correct the error.

In general, data formatting errors can be avoided by paying close attention to the rent roll wizard, which explains what each column of the rent roll should contain and what format it should be in. To access the rent roll wizard, return to the property details page and click the “view rent roll wizard” link under the “Current Rent Roll” section.

Example of formatting error:

Unit	CSJ AMI Level	HOMEUnit? No=0; Low=1; Hi=2	CSJ TIP Unit? 1=yes;0=no	Tenant Head of Household	Rent Subsidy	Tenant Paid Rent
104	012	200	0	Kristine	\$1663.00	seven hundred
106	105	60	0	Kristine	\$0.00	\$1990.00
107	105	30	0	Kristine	\$0.00	\$953.00
109	105	60	0	Kristine	\$0.00	\$1990.00
110	105	60	0	Staff		
111	012	60	0	Kristine	\$1942.00	\$500.00
112	012	60	0	Kristine	\$2151.00	\$291.00
104	105	60	0	Kristine	\$0.00	\$1990.00
104	012	60	0	Kristine	\$2144.00	\$298.00
119	741	50	0	Kristine	\$1659.00	\$291.00
121	012	60	0	Kristine	\$1797.00	\$645.00
122	012	60	0	Kristine	\$1873.00	\$569.00

You can see here that there are formatting issues with the Tenant Paid Rent Column and the CSJ AMI Level Column.

All formatting errors must be fixed before compliance errors are analyzed.

2. Compliance Errors

There are 2 types of compliance errors:

a. *Unit Requirement Errors*

b. *Affordability Requirement Errors*

a. *Unit Requirement Errors*

i. Max Rent Compliance: the tenant paid rent, and utility allowances must not exceed the max rent limit for the unit.

ii. Date Last Certified Compliance: the date certified must be between July 1st of the previous year and June 30th of the current year.

Example of compliance errors:

Unit	Sq	HH Size at Move-In
104	2	
106	3	
107	3	
109	3	
110	3	
111	2	
104	2	
104	3	
104	2	
423	1	
426	2	
121	2	
122	2	
123	2	
124	2	

Unit	HH Size at Move-In	Date Last Certified
1210-348	1	
1210-349	1	
1210-350	1	
1210-351		
1210-352	1	
1210-353	1	
1210-354	2	
1210-110	1	
1210-350	2	
1210-428	1	
1210-359	1	
1210-360	1	
1210-361	1	
1210-362	3	

b. Affordability Requirement Errors

Each Affordability Requirement indicates how many units a property is required to have at a given bedroom and AMI Level.

- You can look at affordability requirements by clicking on “Compliance Requirements” on the Property Details page.
- The units in the rent roll must match these affordability requirements. This means that the rent roll must have the right units, which have the right AMI level.
- If this requirement is not met, the error will indicate the required amount of units and the actual number.

Please note * If there is an issue with Affordability Requirements or Unit Requirements, you can reach out directly to the Development Specialist at the City who is assigned to the property. You can find this information on the Property Page under the section ‘Development Specialist.’

Example of affordability requirement error:

Properties Reference Data

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Sunshine Apartments

Re-Upload

Errors

Affordability Requirements
Occupancy Assumption: HCD

AMI	Bed	Req	Actual
60	total	19	14

Affordability Requirement not met for AR-00000048 (Occupancy Assumption: HCD). Requirement not met for total bedroom at 60%. Required is 19 but actual is 14.

Unit	Number of B
104	
106	
107	
109	
110	
111	
112	
121	
122	
123	
124	



This chart is from the compliance requirements page for your reference.

Updating a Rent Roll / Fixing Errors

Once you are ready to make a fix, there are two ways that errors can be fixed:

Uploading a corrected rent roll

We recommend that if there are many errors or if there are many units, that you correct the errors in a spreadsheet, and then click the Re-Upload button to upload the corrected rent roll.

Fixing the errors directly

Errors can be corrected directly through the online interface. Navigate to a cell that has the error and hover over it, you will see an edit icon in the shape of a pencil, click on this icon. This will open an input box where you can input the new value for the cell. Click the “save” icon on the right to save, and click the “x” icon on the left to cancel.

Please note* if there are too many errors on a rent roll or the property has too many units, you will not be able to make changes directly in the cells. You must re-upload a corrected rent roll instead.

The left screenshot shows a table with columns 'Unit', 'CSJ AMI Level', and 'HOMEUnit? No=0; Low=1; Hi=2'. A red error message is displayed over the cell for Unit 104, CSJ AMI Level 200. The error message reads: "This value must be a valid AMI. The following are valid values: 15, 25, 25.35, 35, 45, 45.55, 55, 60, 65, 80, 100, 110, 120, exact or market/other." Below the table is a 'Re-Upload' button and an 'Errors' section with a table listing formatting issues.

Unit	Column
104	Tenant Paid Rent
104	CSJ AMI Level

The right screenshot shows the same table with a red error message over the cell for Unit 104, CSJ AMI Level 200. Below the table is a 'Re-Upload' button and an 'Errors' section with a table listing formatting issues.

Unit	Column
104	Tenant Paid Rent
104	CSJ AMI Level

Submitting a Rent Roll

Step by Step Instructions

1. Once all errors have been fixed, a green check mark should appear in the left hand navigation with a “Submit” button
2. Click on the “Submit” button to open the “Certification of Compliance” confirmation.
3. Confirm and submit the rent roll. The rent roll and the property should now be in compliance.
4. Navigate back to the individual property page or properties page list to confirm the status of the property has been updated to “Complete”

The left screenshot shows a table with columns 'Unit' and 'Number of Bedroom'. A green check mark is displayed in the left hand navigation, and a 'Submit Rent Roll' button is visible. The table contains data for units 104 through 114.

Unit	Number of Bedroom
104	
106	
107	
109	
110	
111	
112	
113	
114	

The right screenshot shows a 'Certification of Compliance' dialog box with a 'Submit Rent Roll' button. The dialog box contains the following text:

Certification of Compliance

1. By clicking SUBMIT, I am acknowledging that I am fully authorized on behalf of the property owner to submit this report, and do hereby certify that during the current reporting period, this property was continually in compliance with the restrictions as set forth in the Affordability Restriction(s); and
2. The Rent Roll dated 06/12/2020 accurately reflects the property's occupancy information on said date; and
3. The Property Owner, or an entity acting on its behalf, has completed an annual Tenant Income Certification for each unit and has received required documentation to support this certification, both at the resident's initial occupancy and on the anniversary of that occupancy; and
4. The Property Owner understands that transfer of ownership, in part or whole, will require prior written consent from the City of San José and the provision of all required documents per the Affordability Restriction; and
5. If there has been a change in the Property Management company at the property, the City has been notified.

I have read the above statements and certify they are accurate

Submit Rent Roll

Reference Data Page

The Reference Data page contains information about the Rent Limits and Utility Schedule for the current Rent Roll Period. This is for your reference only, no action is required here.

- Rent Limits have certain max rent limits depending on the program type.
- Utility schedule has the Utility Allowance Amounts.

These will change every year and are used for checking compliance of the rent rolls.

The screenshot shows a web interface with a purple header. Below the header, there are two main sections: 'Rent Limits' and 'Other Reference Data'. Under 'Rent Limits', there are three buttons: 'HCD Rent Limits', 'TCAC Rent Limits', and 'HOME Rent Limits'. Under 'Other Reference Data', there is one button: 'Utility Schedule'.

Properties Reference Data

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Reference Data

HCD Rent Limits

% of AMI Rent Level	0 BR	1 BR	2 BR	3 BR	4 BR
15%	384	439	494	549	593
20%	513	586	659	732	791
25%	641	732	823	914	988
30%	769	879	989	1098	1186
35%	897	1025	1152	1280	1383
40%	1025	1171	1317	1463	1581
45%	1153	1317	1482	1646	1779
50%	1281	1464	1646	1829	1976
55%	1409	1610	1811	2012	2174
60%	1538	1757	1976	2195	2372
80%	1819	2079	2339	2598	2806
100%	2300	2628	2956	3285	3548
110%	2530	2890	3252	3614	3902
120%	2760	3154	3549	3943	4258

Properties Reference Data

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Reference Data

Utility Schedule

Heating

Type	0 BR	1 BR	2 BR	3 BR	4 BR
Natural Gas	11	13	15	17	20
LPG/Propane	43	48	54	59	65
Electric	12	16	21	24	26

Cooking

Type	0 BR	1 BR	2 BR	3 BR	4 BR
Natural Gas	3	5	6	7	8
LPG/Propane	13	17	21	25	29
Electric	7	9	11	13	15

Water Heating

Type	0 BR	1 BR	2 BR	3 BR	4 BR
Natural Gas	6	11	18	21	27
LPG/Propane	21	43	64	85	106
Electric	9	19	29	39	49

Support

For all technical issues related to the Rent Roll Portal, please contact customer service at service@substructuretech.com.

These issues include:

- **trouble logging in**
- **problems uploading a rent roll**
- **difficulties editing your profile**
- **other technical issues or glitches that prevent the website from functioning properly.**

For all issues related to the compliance of a property, please contact your Development Specialist assigned to the property.

These issues include:

- **questions regarding affordability requirements**
- **confusion over the current status of a rent roll**
- **resolving non-compliance issues**

Contact information for your Development Specialist can be seen on the Property Details page under the section “Development Specialist.”

