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 needed. 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.

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**Welcome**

**Let’s set up your account**

**First Name**
Bob

**Last Name**
Johnson

**Email**
service@subnetsirens.com

**Phone**
(example: 555-555-5555)

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

- [ ] Text
- [ ] Call

**Submit**

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

**Authentication Code**

**Let’s set up your account**

**Submit**

Didn’t receive a code? Resend authentication code

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

**Welcome**

**Let’s set up your account**

**Password Requirements**

- Must be at least 8 characters
- 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 defined as: `!@#$%^&*()_+`
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.*
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.

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

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)

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

(3)

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

(4)

Enter your authentication code to complete the 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.

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

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.*

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(1–3)

![Welcome](image)

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

(4)

![Welcome](image)

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.
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)

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)

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.
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.

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) 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.

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.
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:

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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.
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:
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”.

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.

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”.

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 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.
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.”