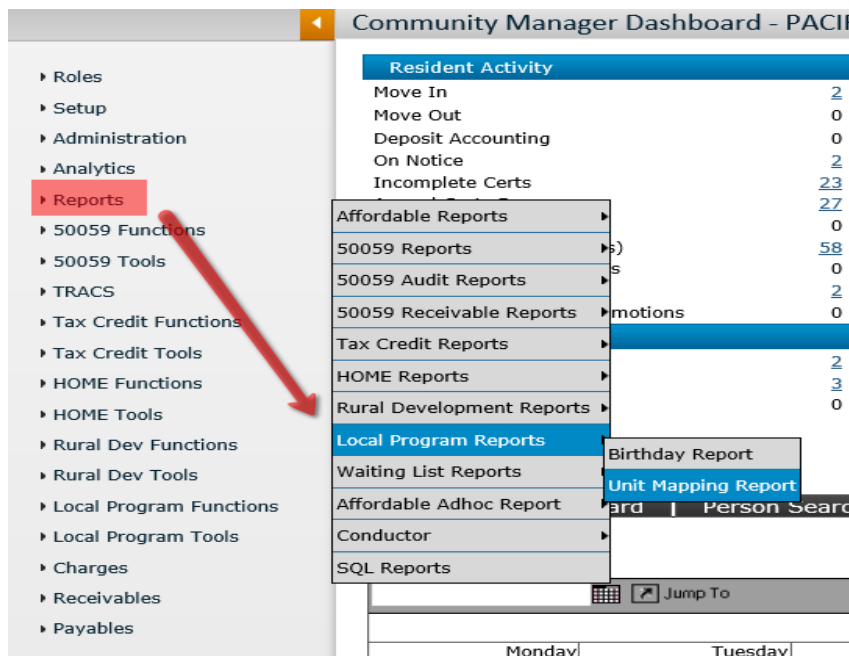


# LOCAL PROGRAM: COPY DOWN CERTIFICATIONS PROCESS

## (FROM TAX CREDIT CERT STACK)

DO NOT PROCEED WITH THE BELOW PROCESS UNTIL YOU HAVE BEEN NOTIFIED BY YOUR COMPLIANCE SPECIALIST OR RSD TO PROCEED WITH THE COPY DOWN PROCESS.

1. TO BEGIN, WE MUST GENERATE THE LOCAL PROGRAMS UNIT MAPPING REPORT. FROM YOUR SIDE MENU GO TO REPORTS>LOCAL PROGRAM REPORTS>UNIT MAPPING

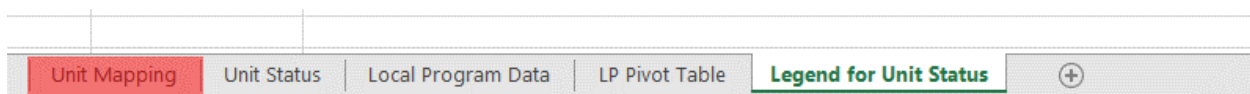


2. FROM THE FILTER SCREEN ENTER YOUR PROPERTY CODE AND THE CURRENT DATE, THEN CLICK GENERATE:

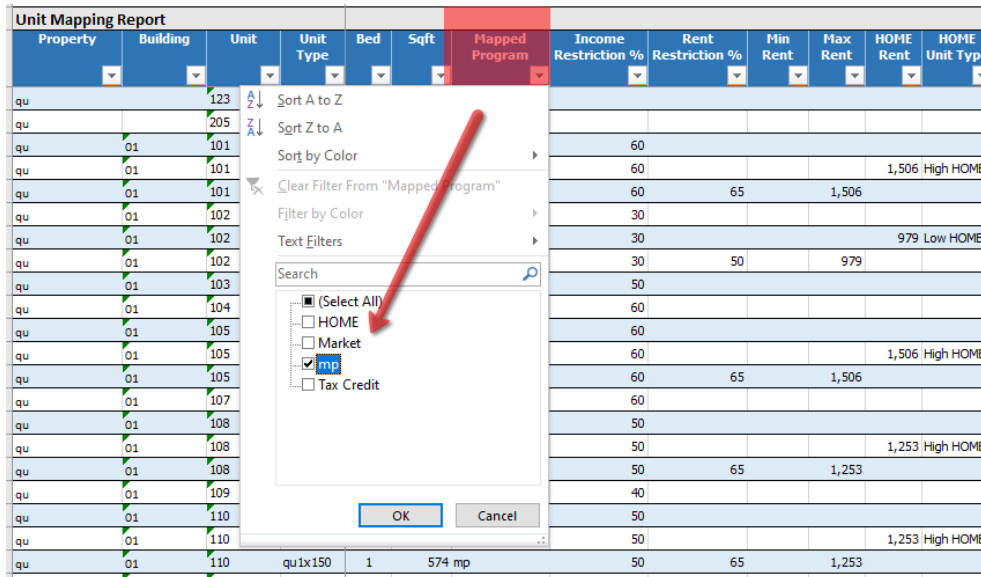
Local Program Unit Detail

Property	<input type="text" value="qu"/>	Output Type	<input type="text" value="Excel"/>	Attach Reports	<input type="checkbox"/>
Local Program	<input type="text"/>	Merge Reports	<input type="checkbox"/>	Email Reports	<input type="checkbox"/>
Building	<input type="text"/>	Show Grid	<input type="checkbox"/>	Show on Portal	<input type="checkbox"/>
Unit	<input type="text"/>				
Effective Date	<input type="text" value="05/06/2020"/>				

3. ONCE YOU OPEN THE REPORT, YOU WILL CLICK ON THE UNIT MAPPING TAB.



4. GO TO “MAPPED PROGRAM” COLUMN AND CHECK ALL YOU’RE APPLICABLE LOCAL PROGRAMS AND CLICK OK:



Property	Building	Unit	Unit Type	Bed	Sqft	Mapped Program	Income Restriction %	Rent Restriction %	Min Rent	Max Rent	HOME Rent	HOME Unit Type
qu		123										
qu		205										
qu	01	101					60					
qu	01	101					60				1,506	High HOME
qu	01	101					60	65		1,506		
qu	01	102					30					
qu	01	102					30				979	Low HOME
qu	01	102					30	50		979		
qu	01	103					50					
qu	01	104					60					
qu	01	105					60					
qu	01	105					60				1,506	High HOME
qu	01	105					60	65		1,506		
qu	01	107					60					
qu	01	108					50					
qu	01	108					50				1,253	High HOME
qu	01	108					50	65		1,253		
qu	01	109					40					
qu	01	110					50					
qu	01	110					50				1,253	High HOME
qu	01	110	qu1x150	1	574	mp	50	65		1,253		

THE UNITS DISPLAYED WILL BE THE UNITS YOU WILL NEED TO CREATE A LOCAL PROGRAM CERT STACK.

- A. IF YOUR LOCAL PROGRAM(S) EFFECTIVE DATES MATCH YOUR TAX CREDIT EFFECTIVE DATE, THE LOCAL PROGRAMS CERTIFICATION STACK CAN BE CREATED BY SIMPLY COPYING DOWN THE TAX CREDIT CERTIFICATIONS FOR EACH RESIDENT. (**IF THE LOCAL PROGRAM EFFECTIVE DATES ARE NOT THE SAME AS YOUR TAX CREDIT EFFECTIVE DATES, GO TO SECTION B**). YOU WILL NEED TO COPY DOWN THE FOLLOWING:
  1. THE MI OR LATEST IC CERTIFICATION (WHICHEVER IS APPLICABLE TO YOUR TAX CREDIT CERT STACK)
  2. AND LAST COMPLETED (MOST RECENT) AR CERTIFICATION.

1. FROM THE RESIDENT SCREEN, CLICK EDIT SO WE CAN CHECK LOCAL PROGRAMS

Resident		Functions ▾	Data ▾	Reports ▾
First Name	Lilia	Resident ID	t0607451	
Middle Name		Property	m45	
Last Name	Morales	Unit	1-102	
Address	11735 HAMLIN STREET	Prospect	p2130740	
City State	LOS ANGELES CA	Status	Current	
Zip	91606	Legal		
<div> <div>Edit</div> <div>Close</div> <div>Help</div> </div>				

[Affordable](#) | 
 [Lease Info](#) | 
 [Deposit Info](#) | 
 [Lease Charges](#) | 
 [Late Fees & Accounts](#) | 
 [Other](#)

50059 Data							
Cert Type	Effective Date	Contract Rent	TTP	Util Allow.	Tenant Rent	HAP	Edit
<a href="#">AR</a> <a href="#">Print</a>	03/01/2020	1,402	273	40	233	1,169	<a href="#">View</a>
<a href="#">GR</a> <a href="#">Print</a>	04/01/2019	1,402	271	40	231	1,171	<a href="#">View</a>
<a href="#">AR</a> <a href="#">Print</a>	03/01/2019	1,377	271	58	213	1,164	<a href="#">View</a>

Tax Credit Data							
Cert Type	Effective Date	Max Rent	Rent	Util Allow.	Tenant Rent	Subsidy	Edit
<a href="#">AR</a> <a href="#">Print</a>	03/01/2020	1,410	273	40	233	1,169	<a href="#">View</a>
<a href="#">AR</a> <a href="#">Print</a>	03/01/2019	1,175	271	58	213	1,164	<a href="#">View</a>
<a href="#">AR</a> <a href="#">Print</a>	03/01/2014	1,175	253	32	221	1,057	<a href="#">View</a>
<a href="#">IC</a> <a href="#">Print</a>	06/01/2013	1,175	250	32	218	1,060	<a href="#">View</a>

50059	<input checked="" type="checkbox"/>	Rent Subsidy Type	
Tax Credit	<input checked="" type="checkbox"/>	Subsidy Provider	
Local Programs	<input type="checkbox"/>	Do not apply rent charges	<input checked="" type="checkbox"/>
		No Summary Receipts	<input type="checkbox"/>

- CHECK THE BOX NEXT TO LOCAL PROGRAMS, THEN CLICK SAVE.

**Resident** Functions Data Reports

First Name: Lilia MI ☐ Resident ID: t0607451  
 Last Name: Morales ☐ Property: m45  
 Address: 11735 HAMLIN STREET Unit: 1-102  
 City/State/Zip: LOS ANGELES CA 91606 Prospect: p2130740  
 Email: Status: Current  
 Alt. Email: Legal: N/A  
 Office:   
 Home:   
 FAX:   
 Save Close Help

Affordable Lease Info Deposit Info Lease Charges Late Fees & Accounts Other

**50059 Data**

Cert Type	Effective Date	Contract Rent	TTP	Util Allow.	Tenant Rent	HAP	Edit
AR <a href="#">Print</a>	03/01/2020	1,402	273	40	233	1,169	<a href="#">Edit</a>
GR <a href="#">Print</a>	04/01/2019	1,402	271	40	231	1,171	<a href="#">View</a>
AR <a href="#">Print</a>	03/01/2019	1,377	271	58	213	1,164	<a href="#">View</a>

**Tax Credit Data**

Cert Type	Effective Date	Max Rent	Rent	Util Allow.	Tenant Rent	Subsidy	Edit
AR <a href="#">Print</a>	03/01/2020	1,410	273	40	233	1,169	<a href="#">Edit</a>
AR <a href="#">Print</a>	03/01/2019	1,175	271	58	213	1,164	<a href="#">View</a>
AR <a href="#">Print</a>	03/01/2014	1,175	253	32	221	1,057	<a href="#">View</a>
IC <a href="#">Print</a>	06/01/2013	1,175	250	32	218	1,060	<a href="#">View</a>

50059 ☒ Rent Subsidy Type:   
 Tax Credit ☒ Subsidy Provider:   
 Local Programs ☒ Do not apply rent charges ☒   
 No Summary Receipts ☐

- CLICK ON THE MOST RECENT IC OR MI CERT IN THE TAX CREDIT CERT STACK:

**Tax Credit Data**

Cert Type	Effective Date	Max Rent	Rent	Util Allow.	Tenant Rent	Subsidy	Edit
AR <a href="#">Print</a>	03/01/2020	1,410	273	40	233	1,169	<a href="#">Edit</a>
AR <a href="#">Print</a>	03/01/2019	1,175	271	58	213	1,164	<a href="#">View</a>
AR <a href="#">Print</a>	03/01/2014	1,175	253	32	221	1,057	<a href="#">View</a>
IC <a href="#">Print</a>	06/01/2013	1,175	250	32	218	1,060	<a href="#">View</a>

- FROM THE SUMMARY SCREEN, GO TO FUNCTIONS AND SELECT COPY TO LOCAL PROGRAM. THIS WILL CREATE AN IC OR MI CERT FOR THE LOCAL PROGRAMS CERT STACK.

**Tax Credit Certification** Functions Data Reports

Passed Validation

**Resident Information**

Code: t0607451 Property: m45  
 Name: Lilia Morales Unit: 1-102  
 Address: 11735 HAMLIN STREET Status: Current  
 City-State-Zip: LOS ANGELES, CA 91606 Office:   
 Home:   
 Move Out:   
 Help HUD 4350.3 Family Info

Annual Recert 0499  
 Interim Recert 983  
 Copy To 59 017  
 Copy To Local Program 018  
 Local Program IC 983

Basic Household Notice Dates

5. ONCE YOU HAVE CREATED THE IC OR MI FOR LOCAL PROGRAMS, YOU WILL SEE A MESSAGE THAT SAYS “COPIED FROM TAX CREDIT. PLEASE REVIEW AND SAVE”. YOU WILL SIMPLY CLICK SAVE.

- a. IF YOU THEN RECEIVED A “FAILED TO QUALIFY” MESSAGE, THEN MOVE ON TO THE NEXT UNIT.

**\*\* PLEASE CONTACT RSD TO ASSIST YOU WITH TROUBLESHOOT WHY THE CERT FAILED COMPLIANCE \*\***

The screenshot shows the 'Local Programs Certification' window in Internet Explorer. At the top, a message reads 'Copied from Tax Credit. Please review and save.' with a red arrow pointing to the 'Save' button. The 'Resident Information' section includes fields for Code (t0607451), Name (Lilia Morales), Address (11735 HAMLIN STREET), City-State-Zip (LOS ANGELES, CA 91606), Property (m45), Unit (1-102), Status (Current), Office, Home, Lease Sign (05/18/1983), Lease From (03/01/2017), Lease To (02/28/2018), Move In (05/18/1983), and Move Out. Buttons for 'Save', 'Delete', 'Help', 'Family Info', and 'Link To TIC' are visible. The 'Basic' tab is selected, and the 'Notice Dates' sub-tab is active.

- b. IF YOU RECEIVE A GREEN “PASSED VALIDATION,” THEN YOU CAN ENTER THE DATE COMPLETED AND CLICK SAVE TO CLOSE.

**NOTE:** THE DATE COMPLETED WILL BE THE SAME AS THE EFFECTIVE DATE OF THE CERT:

The screenshot shows the 'Local Programs Certification' window after validation. A green message 'Passed Validation' is displayed. The 'Critical Dates' section includes fields for Certification Type (IC=Initial Cert), Effective Date (06/01/2013), Next Annual Recert (06/01/2014), Project Move In (05/18/1983), and Date Completed. The 'Unit Information' section includes Unit Code (1-102) and Bedrooms (2). The 'Effective Rent Limits' section includes Minimum Rent (0) and Maximum Rent (987). A red arrow points from the 'Date Completed' field to the 'Save' button. The 'Basic' tab is selected, and the 'Notice Dates' sub-tab is active.

6. NEXT YOU WILL COPY DOWN THE LAST COMPLETED (MOST RECENT) AR CERT. IF YOU HAVE AN INCOMPLETE CERT, YOU CAN COPY DOWN THAT CERT ONCE IT HAS BEEN COMPLETED. CLICK ON AR IN THE TAX CREDIT CERT STACK:

Tax Credit Data							
Cert Type	Effective Date	Max Rent	Rent	Util Allow.	Tenant Rent	Subsidy	Edit
<a href="#">AR</a> <a href="#">Print</a>	03/01/2020	1,410	273	40	233	1,169	<a href="#">Edit</a>
<a href="#">AR</a> <a href="#">Print</a>	03/01/2019	1,175	271	58	213	1,164	<a href="#">View</a>
<a href="#">AR</a> <a href="#">Print</a>	03/01/2014	1,175	253	32	221	1,057	<a href="#">View</a>
<a href="#">IC</a> <a href="#">Print</a>	06/01/2013	1,175	250	32	218	1,060	<a href="#">View</a>

Local Programs Data							
Cert Type	Effective Date	Max Rent	Rent	Util Allow.	Tenant Rent	Subsidy	Edit
<a href="#">IC</a> <a href="#">Print</a>	06/01/2013	987	250	32	218	1,060	<a href="#">View</a>

7. YOU WILL FOLLOW STEPS 4-6 AS YOU DID FOR THE IC OR MI CERT.
8. COMPLETE THIS COPY PROCESS FOR ALL LOCAL PROGRAMS RESIDENTS
9. WORK WITH RSD TO TROUBLESHOOT AND FIX ANY RED "FAILED TO QUALIFY" NOTIFICATIONS.

- B. IF YOU EFFECTIVE DATES **DO NOT** MATCH THE EFFECTIVE DATES OF YOUR TAX CREDIT CERTS, YOU WILL DO THE FOLLOWING:

1. CLICK ON THE MOST RECENT IC OR MI CERT IN THE TAX CREDIT CERT STACK:

Tax Credit Data							
Cert Type	Effective Date	Max Rent	Rent	Util Allow.	Tenant Rent	Subsidy	Edit
<a href="#">AR</a> <a href="#">Print</a>	03/01/2020	1,410	273	40	233	1,169	<a href="#">Edit</a>
<a href="#">AR</a> <a href="#">Print</a>	03/01/2019	1,175	271	58	213	1,164	<a href="#">View</a>
<a href="#">AR</a> <a href="#">Print</a>	03/01/2014	1,175	253	32	221	1,057	<a href="#">View</a>
<a href="#">IC</a> <a href="#">Print</a>	06/01/2013	1,175	250	32	218	1,060	<a href="#">View</a>

2. FROM THE COMPLIANCE SCREEN GO TO FUNCTIONS>LOCAL PROGRAMS IC.

Tax Credit Certification

Functions

Data

Reports

Passed validation

Resident Information

Code

t0607451

Property

m45

Name

Lilia Morales

Unit

1-102

Address

11735 HAMLIN STREET

Status

Current

City-State-Zip

LOS ANGELES, CA 91606

Home

Move Out

Help

HUD 4350.3

Family Info

Annual Recert

Interim Recert

Copy To 59

Copy To Local Program

Local Program IC

Basic

Household

Notice Dates

Critical Dates

Certification Type

IC=Initial Cert

Effective Date

06/01/2013

Unit Information


Unit Code

1-1

Bedrooms

2

3. ENTER THE EFFECTIVE DATE OF THE IC AND CLICK SUBMIT.

 <https://www.yardipca.com/?CertId=830499&FunctionType=24> - Yardi Systems, Inc. - New Certificati - Internet Explorer

### New Certification

#### Create Local Program IC

Local Program IC Date

05/06/2014

Submit

Cancel

4. YOU WILL CLICK FAMILY INFO AND ENTER THE INFORMATION FROM THE CERTIFICATION.
5. YOU WILL ENTER THE TENANT RENT, UTILITY ALLOWANCE, AND SUBSIDY (IF APPLICABLE) IN THE COMPLIANCE SCREEN AND CLICK SAVE.
6. IF YOU GET A GREEN PASSED VALIDATION MESSAGE, ENTER THE DATE COMPLETED ON THE CERT. THE DATE COMPLETED WILL BE THE EFFECTIVE DATE OF THE CERT.
7. IF YOU RECEIVE A RED FAILED VALIDATION MESSAGE, PLEASE CONTACT RSD.