

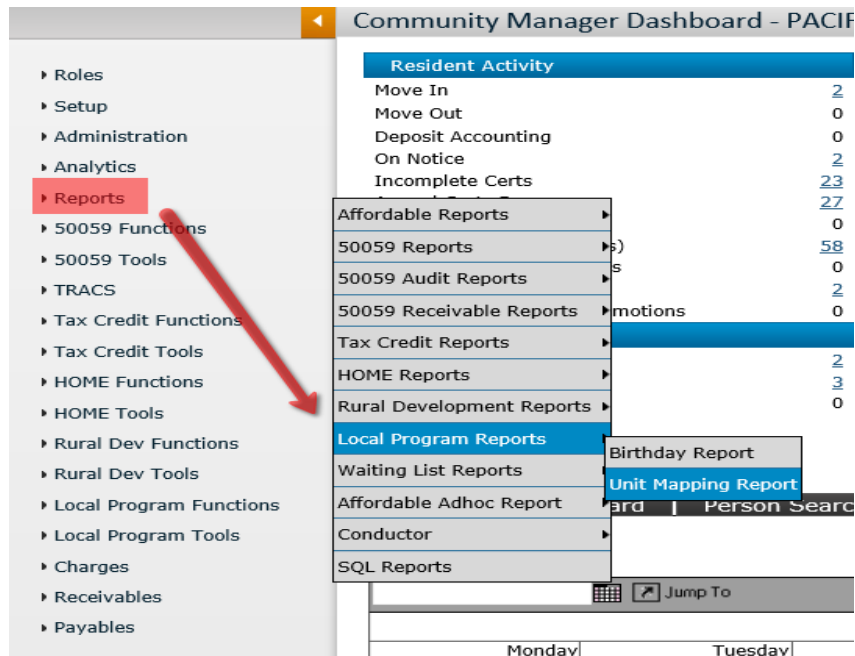
LOCAL PROGRAM: COPY DOWN CERTIFICATIONS PROCESS

(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.

Please make sure you are in your Tax Credit Onsite before you begin.

1. FIRST 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"/>	<input type="button" value="Generate"/>	<input type="button" value="Clear"/>	<input type="button" value="Help"/>	<input type="button" value="Preview"/>

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:

Unit Mapping Report															
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	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 FOR.

- 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. PLEASE REACH OUT TO YOUR ASSIGNED CS IF YOU ARE UNSURE OF THE IC DATES FOR YOUR UNITS. **(IF THE LOCAL PROGRAM EFFECTIVE DATES ARE NOT THE SAME AS YOUR TAX CREDIT EFFECTIVE DATES, GO TO STEP 10.D).**

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.

5. 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			
Edit Close Help						

Affordable | Lease Info | Deposit Info | Lease Charges | Late Fees & Accounts | Ot

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

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

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"/>

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

Resident Functions Data Reports

First Name Lilia MI ☐
 Last Name Morales ☐
 Address 11735 HAMLIN STREET
 City/State/Zip LOS ANGELES CA 91606
 Email
 Alt. Email
 Office
 Home
 FAX

Resident ID t0607451
 Property m45
 Unit 1-102
 Prospect p2130740
 Status Current
 Legal N/A

Save Close Help

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

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

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

50059 ☒
 Tax Credit ☒
 Local Programs ☒

Rent Subsidy Type
 Subsidy Provider
 Do not apply rent charges ☒
 No Summary Receipts ☐

7. 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 Print	03/01/2020	1,410	273	40	233	1,169	Edit
AR Print	03/01/2019	1,175	271	58	213	1,164	View
AR Print	03/01/2014	1,175	253	32	221	1,057	View
IC Print	06/01/2013	1,175	250	32	218	1,060	View

8. 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 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

Functions Data Reports

Annual Recert
 Interim Recert
 Copy To 59
 Copy To Local Program
 Local Program IC

Basic Household Notice Dates

9. 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 ****

https://www.yardipca.com/?Id=911313 - Yardi Systems, Inc. - Local Programs Certification - Internet Explorer

Local Programs Certification Functions Data Report

Copied from Tax Credit. Please review and save.

Resident Information Ctrl#911313

Code	t0607451	Property	m45	Lease Sign	05/18/1983
Name	Lilia Morales	Unit	1-102	Lease From	03/01/2017
Address	11735 HAMLIN STREET	Status	Current	Lease To	02/28/2018
		Office		Move In	05/18/1983
City-State-Zip	LOS ANGELES, CA 91606	Home		Move Out	

Save Delete Help Family Info Link To TIC

Basic Notice Dates

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

NOTE: THE DATE COMPLETED FOR THE “IC” OR “MI” CERT WILL BE THE SAME AS THE EFFECTIVE DATE OF THE CERT:

https://www.yardipca.com/?Id=911313 - Yardi Systems, Inc. - Local Programs Certification - Internet Explorer

Local Programs Certification Functions Data Reports

Passed Validation

Resident Information Ctrl#911313

Code	t0607451	Property	m45	Lease Sign	05/18/1983
Name	Lilia Morales	Unit	1-102	Lease From	03/01/2017
Address	11735 HAMLIN STREET	Status	Current	Lease To	02/28/2018
		Office		Move In	05/18/1983
City-State-Zip	LOS ANGELES, CA 91606	Home		Move Out	

Save Delete Help Family Info Link To TIC

Basic Notice Dates

Critical Dates	
Certification Type	IC=Initial Cert
Effective Date	06/01/2013
Next Annual Recert	06/01/2014
Project Move In	05/18/1983
Date Completed	

Unit Information	
Unit Code	1-102
Bedrooms	2

Effective Rent Limits	
Minimum Rent	0
Maximum Rent	987

Rent Information

10. 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
AR Print	03/01/2020	1,410	273	40	233	1,169	Edit
AR Print	03/01/2019	1,175	271	58	213	1,164	View
AR Print	03/01/2014	1,175	253	32	221	1,057	View
IC Print	06/01/2013	1,175	250	32	218	1,060	View

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

A. YOU WILL FOLLOW STEPS 5-9 AS YOU DID FOR THE IC OR MI CERT.

- 1) **NOTE: THE DATE COMPLETED FOR THE “AR” CERTIFICATION SHOULD MATCH THE KAGC APPROVAL DATE FOR CERTIFICATION (JUST LIKE TAX CREDIT CERT).**

- B. COMPLETE THIS COPY PROCESS FOR ALL LOCAL PROGRAMS RESIDENTS
 C. WORK WITH RSD TO TROUBLESHOOT AND FIX ANY RED “FAILED TO QUALIFY” NOTIFICATIONS.
 D. IF YOUR 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
AR Print	03/01/2020	1,410	273	40	233	1,169	Edit
AR Print	03/01/2019	1,175	271	58	213	1,164	View
AR Print	03/01/2014	1,175	253	32	221	1,057	View
IC Print	06/01/2013	1,175	250	32	218	1,060	View

- 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

Office

Move Out

Help

HUD 4350.3

Family Info

Basic

Household

Notice Dates

Annual Recert

Interim Recert

Copy To 59

Copy To Local Program

Local Program IC

0499

983

017


018

983

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



- 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.