

Tenant Portal User Guide



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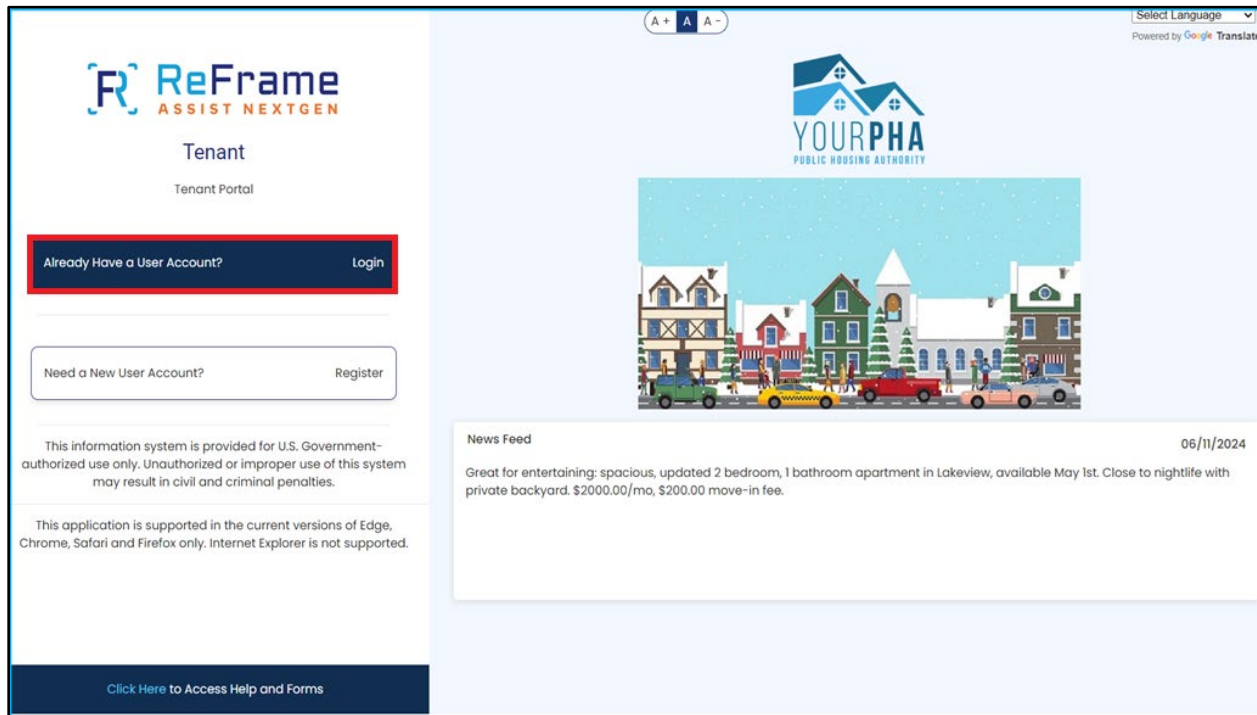
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Tenant Portal

Website Navigation

1. Navigate to the Tenant website at: <Add URL here.>

The Registration page is displayed.



2. If you already have an email login and password, click **Login**.

Log In

1. Click Log In and enter the following information:

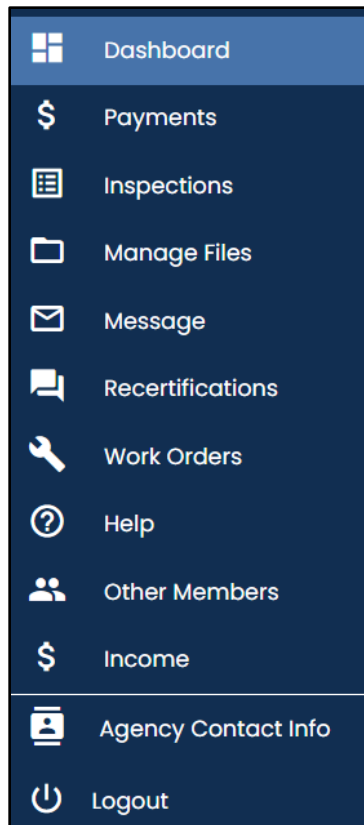
- Email address
- Password

2. Click the blue **Log In** Button.

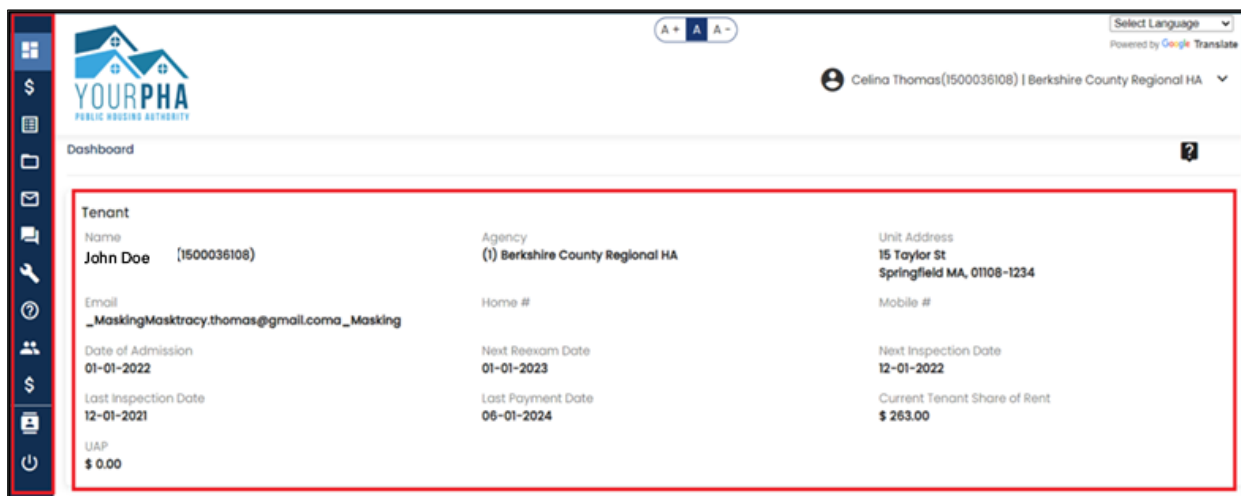
The image shows a login interface for a 'Tenant'. At the top, the word 'Tenant' is centered. Below it are two buttons: 'Log In' and 'Sign Up'. The 'Log In' button is highlighted with a red rectangle. Underneath these buttons are two input fields. The first field is for the email address, containing 'Marylouise' and '@test.com'; its icon is highlighted with a red rectangle. The second field is for the password, containing 'XXXX XXXXXX XXXX' and a toggle icon; its icon is also highlighted with a red rectangle. Below the password field is a link that says 'Don't remember your password?'. At the bottom of the form is a large, dark blue button with the text 'LOG IN >', which is highlighted with a red rectangle.

Dashboard

The User lands on the Dashboard. There is a left-hand navigation menu.



The dashboard displays information pertaining to the tenant and unit.



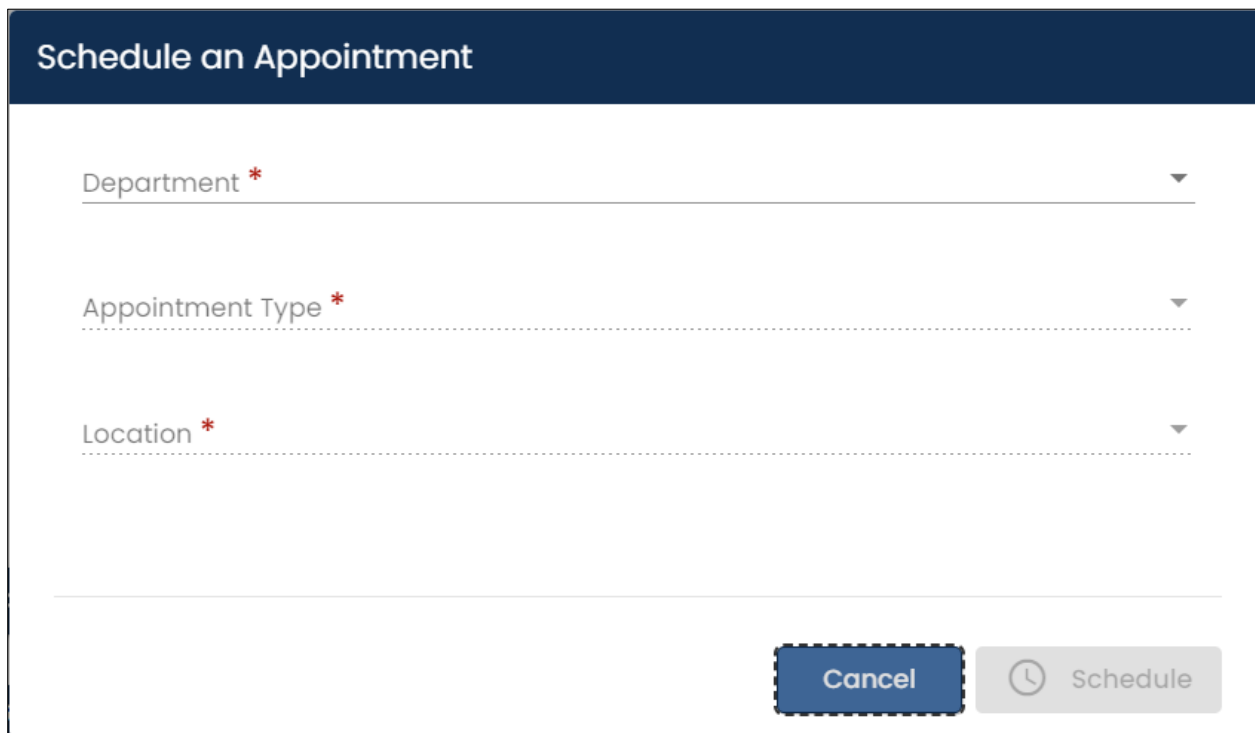
Schedule Appointments

The tenant can search for any scheduled appointments by selecting a date range.



The screenshot shows a web interface titled "Scheduled Appointments". It features a search bar with a "Date Range" of "07/25/2024 - 08/01/2024". There are "Clear" and "Refresh" buttons next to the date range. A "+ New Appointment" button is located in the top right corner. Below the search bar is a table header with columns: "APPOINTMENT TYPE ↑", "DEPARTMENT ↑", "LOCATION ↑", "DATE ↑", and "TIME ↑". The table body shows "No Records Found." At the bottom right, there is a pagination control showing "Items Per Page 10" and "0 of 0".

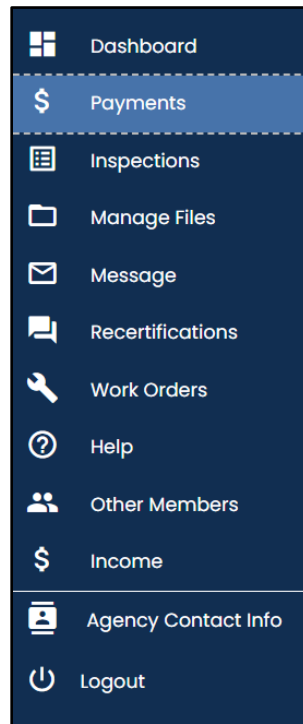
3. To create an appointment with the local PHA, select **+ New Appointment**.
4. In the **Select Department, Appointment Type** and **Location** dropdown menus, select the appropriate options.



The screenshot shows a form titled "Schedule an Appointment". It has three dropdown menus: "Department *", "Appointment Type *", and "Location *". Each dropdown menu has a downward arrow on the right. At the bottom right of the form, there are two buttons: a blue "Cancel" button and a grey "Schedule" button with a clock icon.

5. Click **Schedule**. The appointment is scheduled.

Payments



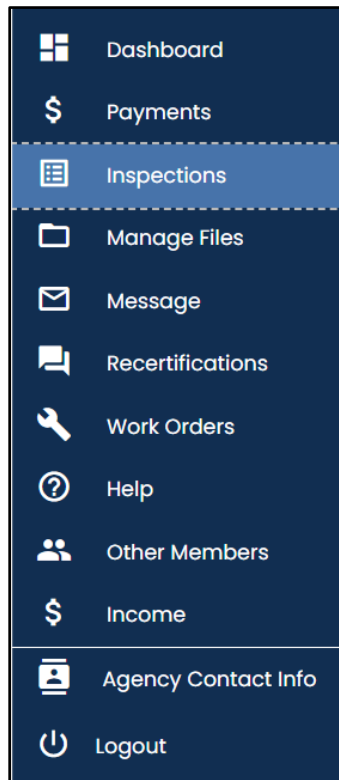
The Payments tab displays current Payment information such as tenant payments to the landlord, HAP amount, contract rent, and sum of all payments. Tenants have access to two years of payment history.

1. Tenants may use the search criteria to filter by Date Range.



2. To export the results, click **Export**. An Excel spreadsheet is now created.

Inspections



Inspection records are displayed on the inspections tab. The records date back three years.

1. Tenants can use the following search criteria to filter the results by any date.
2. You can export the results. Click the **Export** button and an Excel spreadsheet will be created.

Search Inspection Records

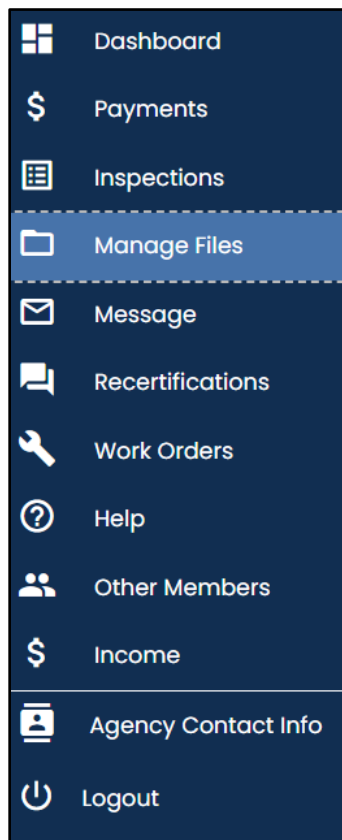
Date Range

Clear

Refresh

Export

Manage Files



In the Manage Files tab, Tenants can upload necessary documents and view current uploaded documents.

Manage Files

Upload Files

Upload .pdf, .docx, .xls, .csv, .jpeg, .png and .tiff files with max size of 4MB.

Document Type *

☐ Bank Account Authorization

Drag here the document to upload or

Choose file to upload

Browse for file

Uploaded Documents

Received Documents

Invoice

FILE NAME ↑

DATE UPLOADED ↓

DESCRIPTION ↑

ACTIONS

1. To select the document type, document sub type, and then choose the document you would like to upload, click **Browse for File**.

Or

To upload, drag and drop the document.

A green success message is displayed when a file is uploaded.

Manage Files

Upload Files

Upload pdf, docx, xls, csv, jpeg, png and .tiff files with max size of 4MB.

Document Type *

- ☐ Selection Related
- ☐ Recertification
- ☐ Miscellaneous
- ☐ Assets
- ☐ Audit Inspection
- ☐ Re-Examination Packet
- ☐ Briefing Packet
- ☐ Deductions
- ☐ Damage Claim Payments
- ☐ Direct Deposit Form
- ☐ Family Self-Sufficiency
- ☐ Letter of Intent
- ☐ Other Landlord Documentation
- ☐ Other
- ☐ Lease and Contracts
- ☒ Disability Documentation
- ☐ Inspection Information
- ☐ Selection Packet
- ☐ RFTA
- ☐ Unemployment Document
- ☐ Change of Unit
- ☐ Owner Payment
- ☐ Unit Documentation

Document Sub Type *

- ☒ Rent Increase Request

Drag here the document to upload or

Choose file to upload [Browse for file](#)

2. To delete documents, click the three dots icon in the **Actions** column. If the Case worker has viewed the documents, they cannot be deleted.

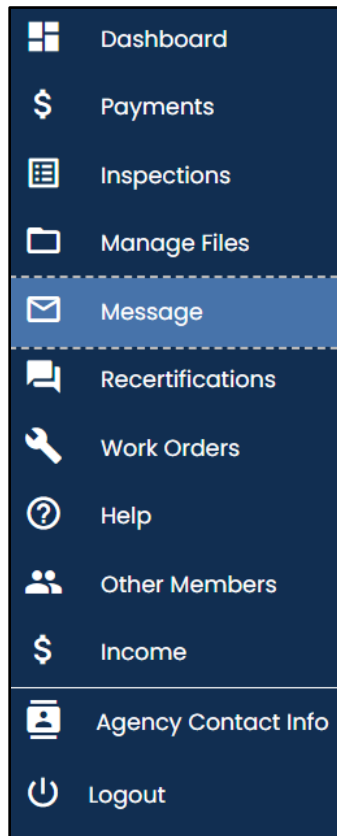
Or

To download previously uploaded documents, click the **Download** option in the **Actions** column.

3. To view any document, click the **View** option.

FILE NAME ↑	DATE UPLOADED ↓	DESCRIPTION ↑	ACTIONS
Earth Day Teams bg_2-20240611134307.jpg	06/11/2024, 1:43 PM	Rent Increase Request	<div><div></div><div>Delete</div><div>Download</div><div>View</div></div>
Inspection Maintenance Reports0.PNG	09/13/2022, 1:57 PM	Recertification	<div><div></div><div>Delete</div><div>Download</div><div>View</div></div>

Message



The Message tab allows Users to send and receive messages with their PHA.

1. To search for messages, enter a date range and click **Search**.
2. To send messages to the case worker assigned to the caseload, click **New Message** and complete the fields.
3. Click **Send**.

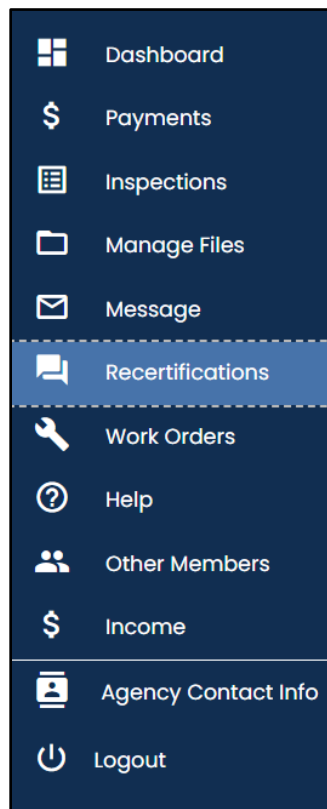
A screenshot of the 'Message' interface. At the top, there's a header bar with the title 'Message'. Below it, on the right side, is a button labeled 'New Message' with an envelope icon, which is highlighted with a red border. Underneath, there's a 'Search Message' section. It includes a 'Date Range' input field showing '03/23/2024 - 04/22/2024' with a calendar icon, a 'Clear' button with an 'X' icon, and a 'Refresh' button with a circular arrow icon. At the bottom of the search section, there's a 'Message' input field and a 'Search' button with a magnifying glass icon.

A green success message is displayed when a message is sent.

4. To view all messages received by the applicant from the caseworker, click **Inbox**.



Recertifications



Tenants can view any completed or pending recertifications.

Tenants will be able to recertify within 90 days from the next recertification date by selecting the **Recertification Cycle**.

The page displays Recertification details, documents, or both.

Recertifications

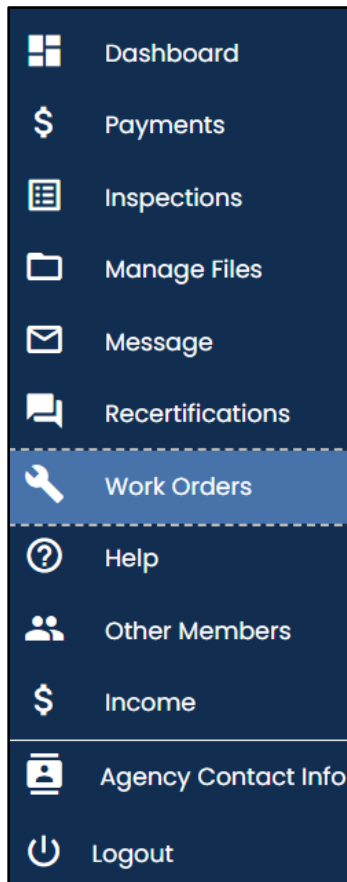
You will be able to recertify within 90 days from your next recertification date

Select Recertification Cycle

Recertification Details

Documents

Work Orders

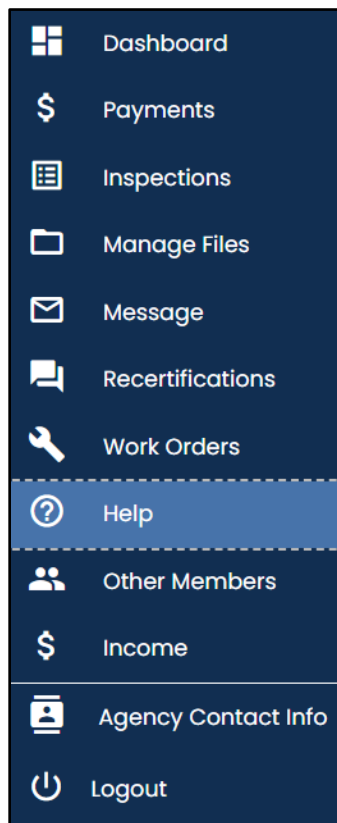


Any Work Orders, completed or pending for the Tenant, is displayed on this tab.

Work orders have the following information displayed.

WORK ORDER # ↑	UNIT ADDRESS ↑	PRIORITY ↑	REQUESTED DATE ↓	REQUESTED BY ↑	COMPLETED DATE ↑	STATUS ↑	WORKORDER DESCRIPTION ↑
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Help

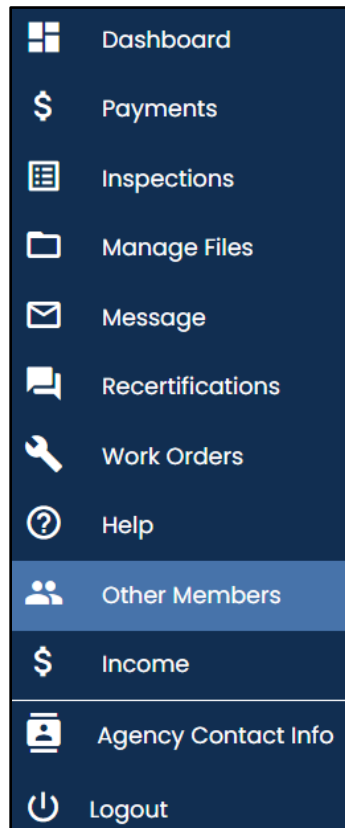


Tenants can find help documents and forms on the Help tab.

1. To access help documents, click any relevant blue hyperlinked resource.



Other Members



The Other Members tab contains information about members of the household, not the Head of Household.

Add a New Member

1. To add a member, click **+ ADD Member**.





2. Enter the required information and click **Save**.

Edit or Delete a Member Record*

List all household members regardless of their age.

1. To make changes to the **Head of Household** information, click the three-dots icon in the **Actions** column.
2. Click **Edit** and make the needed changes. Click **Save**.
3. To edit or delete other members, click the three dots icon in the **Actions** column.
4. Click **Edit** or **Delete**.

Other Members										
Please list all household members regardless of age.										
										+ Add Member
MEMBER ID	FIRST NAME	MIDDLE INITIAL	LAST NAME	GENDER	BIRTH DATE	SSN OR ITIN	RELATIONSHIP	RACE	ETHNICITY	ACTIONS
01	John		Doe	Male	01-01-1988	763-27-6327	Head of Household	White	Non-Hispanic	⋮
02	John		Doe	Female	01-01-1988	626-72-7821	Adult	Asian	Hispanic	⋮
										 Edit
										 Delete

*Some housing authorities require their Tenants to make any needed updates and changes through your Case Worker, not in the portal. If this option is not available to you, please call your Public Housing Agency.

Questions

Any questions the local PHA may have will be listed under the Questions tab. If they are mandatory, they are marked with a red asterisk *.

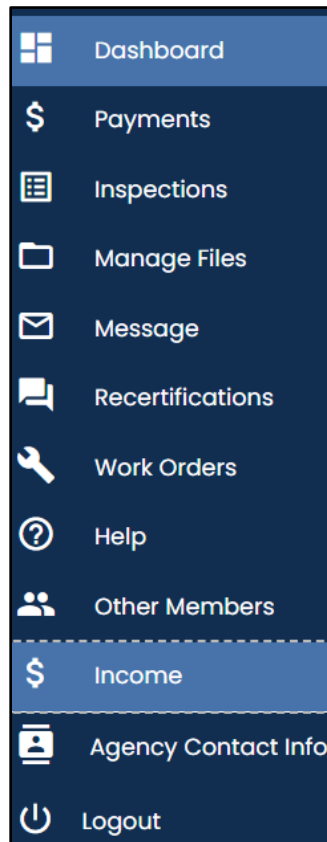
- To save the answers to the questions, click **Save**.

The screenshot shows a web form titled "Other Members" with the instruction "Please list all household members regardless of age." Below this is a table with two columns: "Member" and "Application Questions". The "Application Questions" column is active and shows a section titled "Family Self-Sufficiency" with two questions, each with "Yes" and "No" radio button options. The first question is "Is the household familiar with the PHA's Family Self-Sufficiency Program?" with "No" selected. The second question is "Is the household interested in enrolling in the PHA's Family Self-Sufficiency Program?" with "No" selected. At the bottom right of the form are "Cancel" and "Save" buttons.

Member	Application Questions
	<p>Family Self-Sufficiency</p> <p>Is the household familiar with the PHA's Family Self-Sufficiency Program?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Is the household interested in enrolling in the PHA's Family Self-Sufficiency Program?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p>

Cancel Save

Income

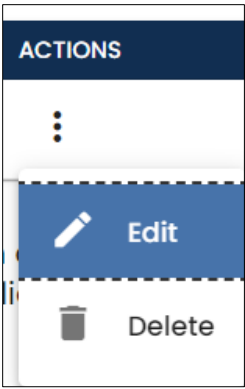


On the Income tab, the tenant can add or edit any income they may have. *

Note: This may not be permitted by the User's PHA.


* Some housing authorities require their Tenants to make any needed updates and changes through your Case Worker, not in the portal. If this option is not available to you, please call your Public Housing Agency.

1. To add income, click the **+Add income** button.
2. Fill the required fields and click **Save**.
3. To edit any of the income information for any household members, click the three dots icon in the **Actions** column.

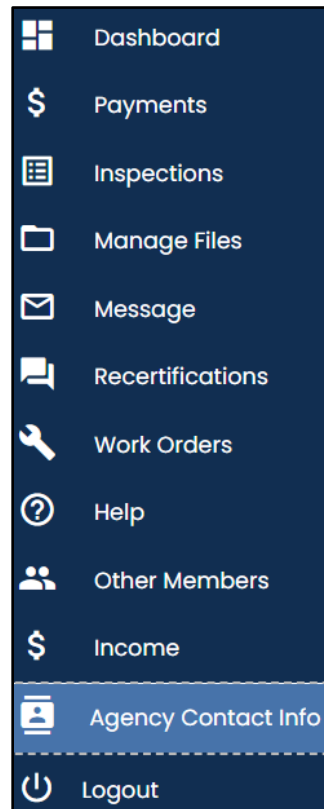


4. To delete any of the member’s income, click the three dots icon in the **Actions** column. Now, click **Delete**.

The page displays the sum of all incomes. In addition, it shows the Income level for the family.

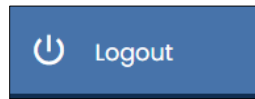
MEMBER NAME	AMOUNT PER PERIOD	TIMES PER YEAR	TOTAL PER YEAR	INCOME TYPE	DESCRIPTION	ACTIONS
	\$13,956.00	1	\$13,956.00	Social Security		
Sum of All Incomes: \$13,956.00 Area Median Income: Extremely Low						

Agency Contact Info



Tenants can view contact information for the PHA. This includes mailing address.

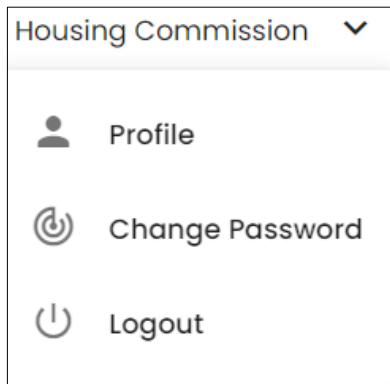
Logout



The last tab, Logout, is used to logout of the Tenant portal.

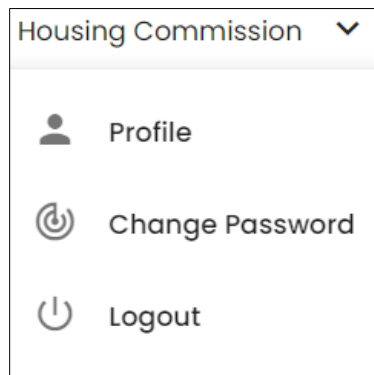
Profile

To update the user's profile, click the arrow following the name of the local PHA.



1. Click **Profile** and make the required changes.
2. Click **Save**.

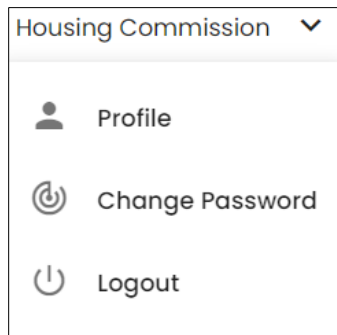
Change Password



1. To change the password, click the arrow following the name of the local PHA.
2. Click **Change Password**.
3. Enter the new password, re-enter it, and then click **Save**.

A screenshot of the "Change Password" form in the "YOURPHA PUBLIC HOUSING AUTHORITY" system. The form has two input fields: "New Password" and "Confirm Password", both with red arrows pointing to them. Below the fields are "Cancel" and "Save" buttons. The "Save" button is highlighted in red. The top of the page shows the user's name "John Doe" and the role "Berkshire County Regional PHA".

Logout



To log out, click the arrow following the name of the local PHA.

- Click the arrow and then click **Logout**.

The User will be logged out of the portal.