Tenant Portal User Guide

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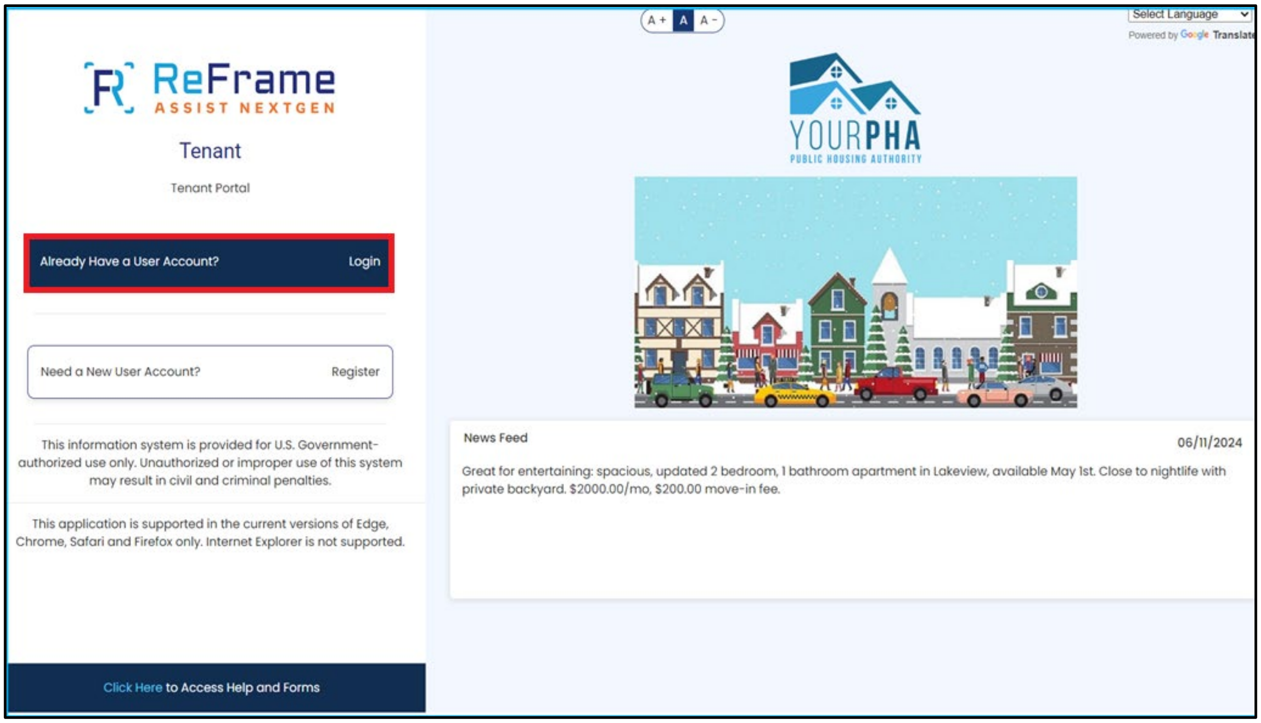
Tenant Portal

Website Navigation

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

The Registration page is displayed.



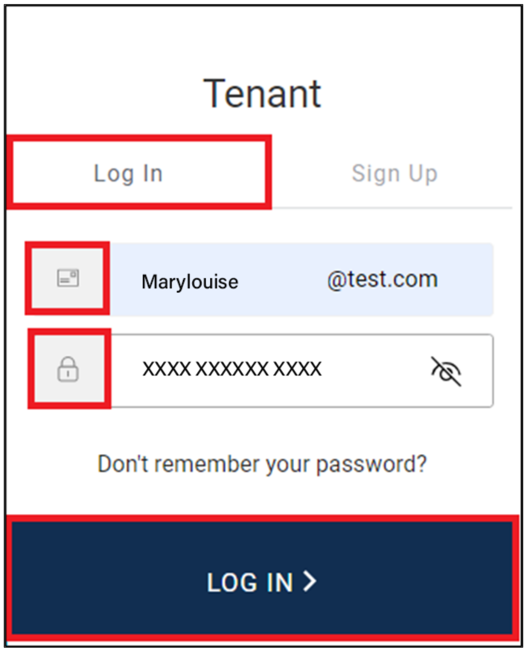
2. If you already have an email login and password, click **Login**.

Log In

1. Click Log In and enter the following information:

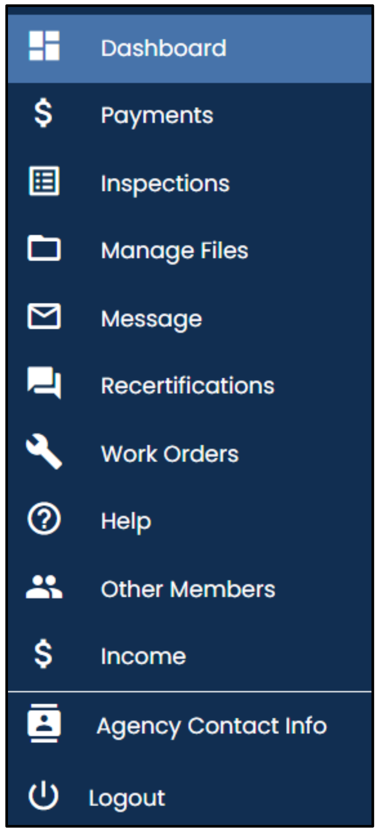
    - Email address
    - Password

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

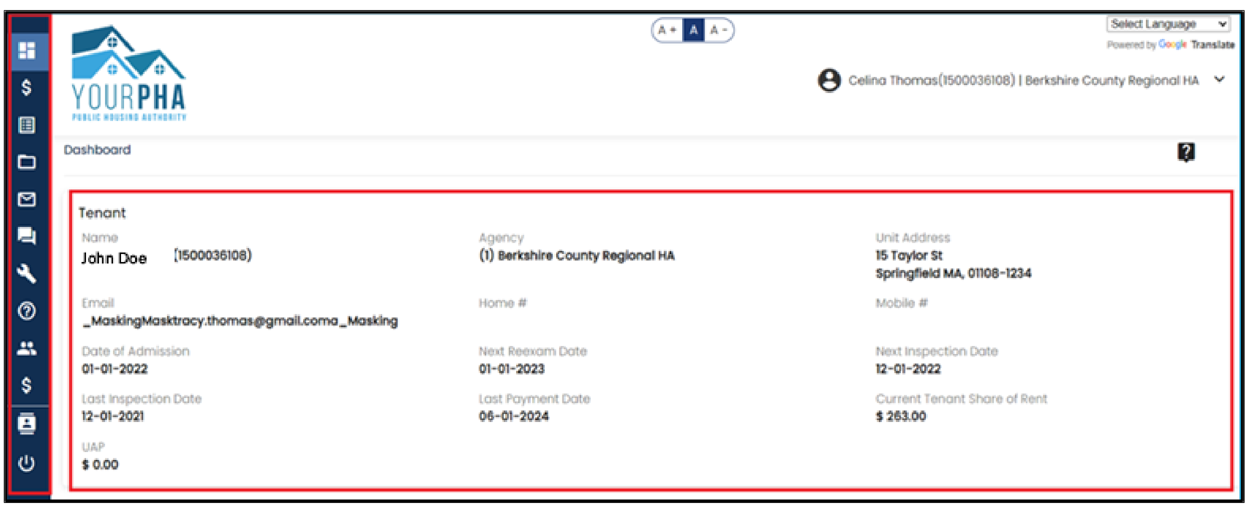


Dashboard

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



The dashboard displays information pertaining to the tenant and unit.

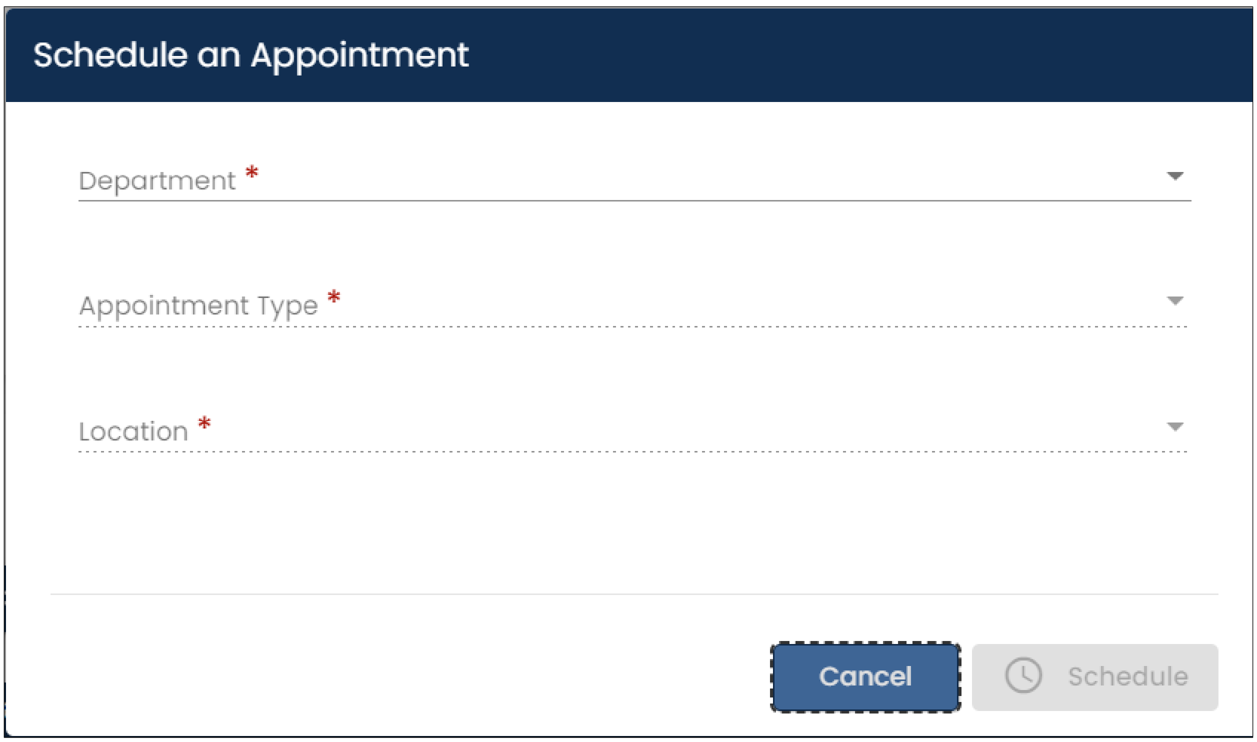


Schedule Appointments

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

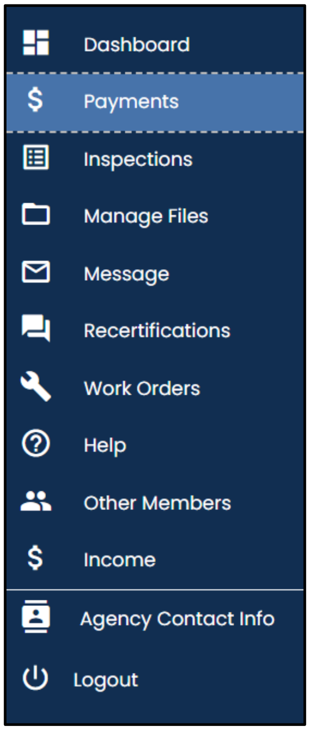
3. To create an appointment with the local PHA, select **+ New Appointment**.

4. In the **Select Department**, **Appointment Type** and **Location** dropdown menus, select the appropriate options.



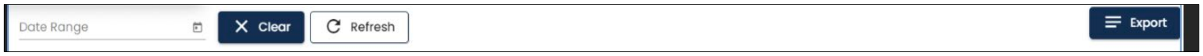
5. Click **Schedule**. The appointment is scheduled.

Payments



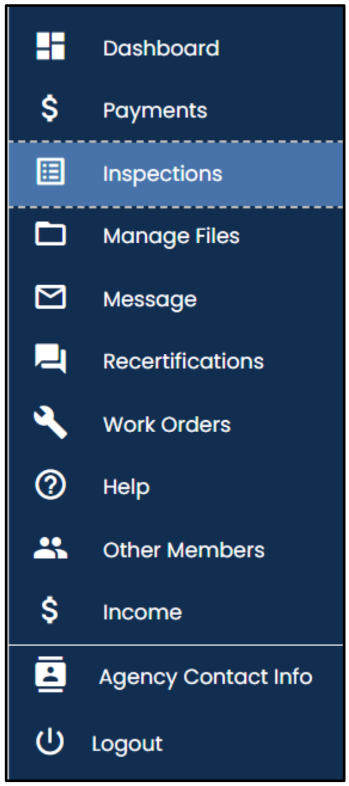
The Payments tab displays current Payment information such as tenant payments to the landlord, HAP amount, contract rent, and sum of all payments.
Tenants have access to two years of payment history.

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.

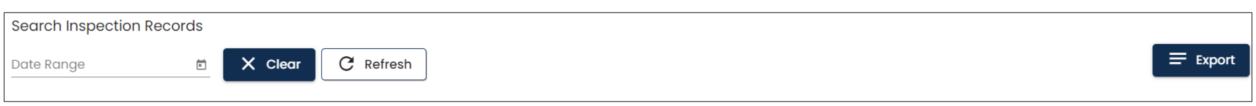
Inspections



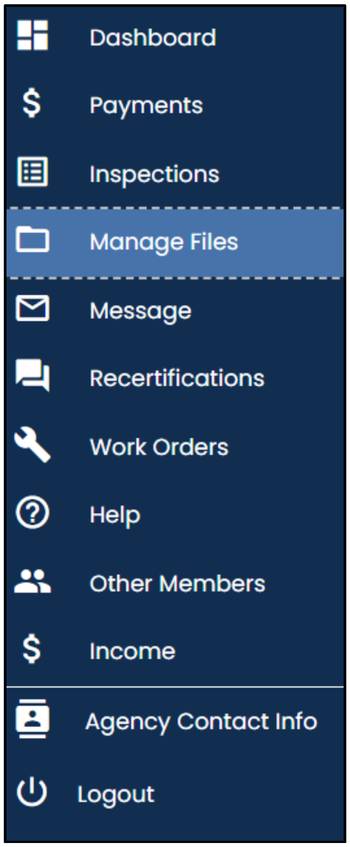
Inspection records are displayed on the inspections tab. The records date back three years.

1. Tenants can use the following search criteria to filter the results by any date.

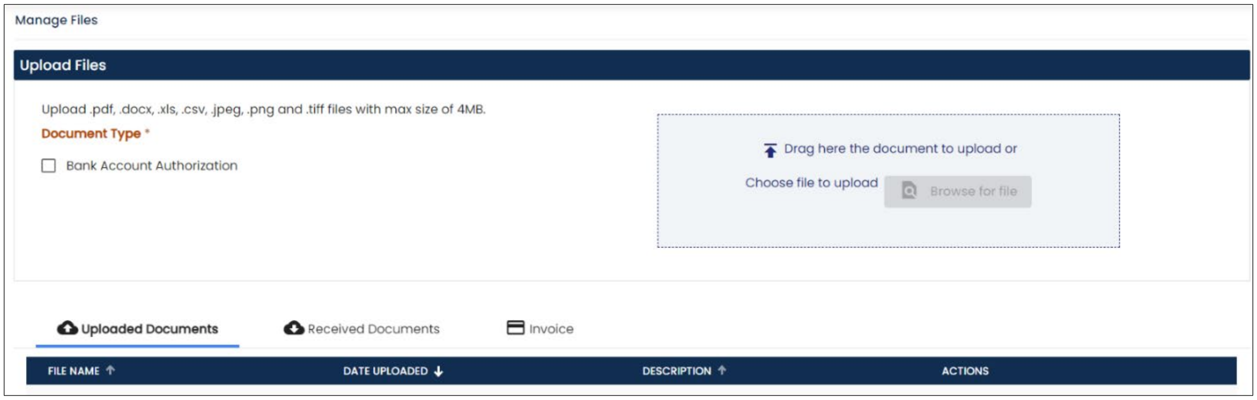
2. You can export the results. Click the **Export** button and an Excel spreadsheet will be created.



Manage Files



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

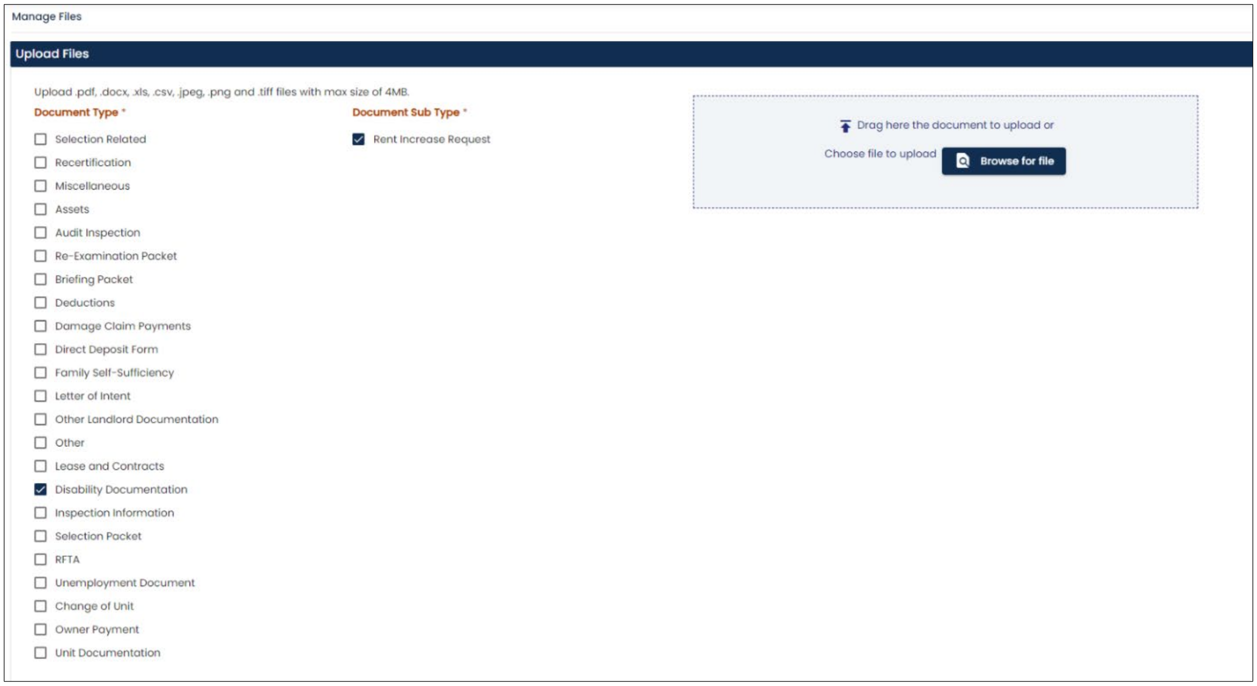


1. To select the document type, document sub type, and then choose the document you would like to upload, click **Browse for File**.

   Or

   To upload, drag and drop the document.

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

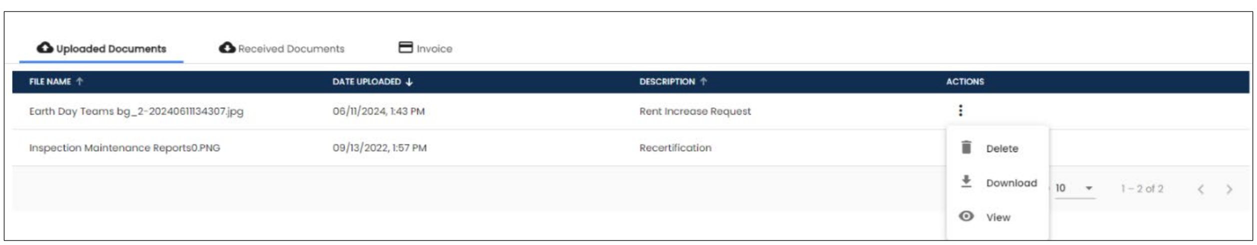


2. To delete documents, click the three dots icon in the **Actions** column. If the Case worker has viewed the documents, they cannot be deleted.

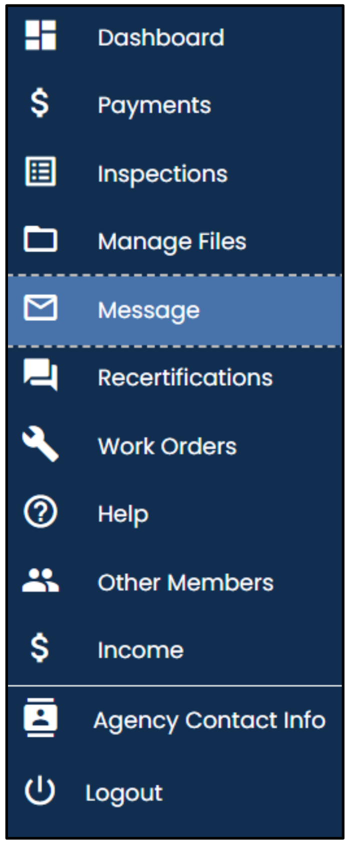
   Or

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

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



Message

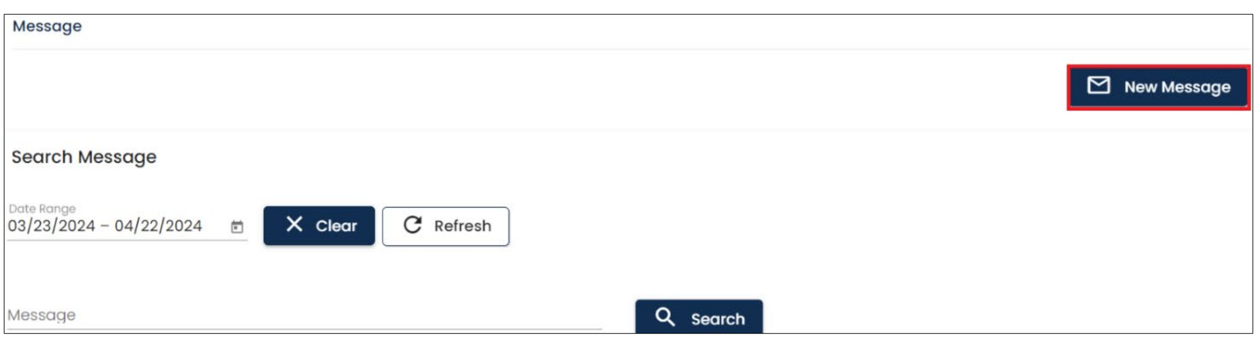


The Message tab allows Users to send and receive messages with their PHA.

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.

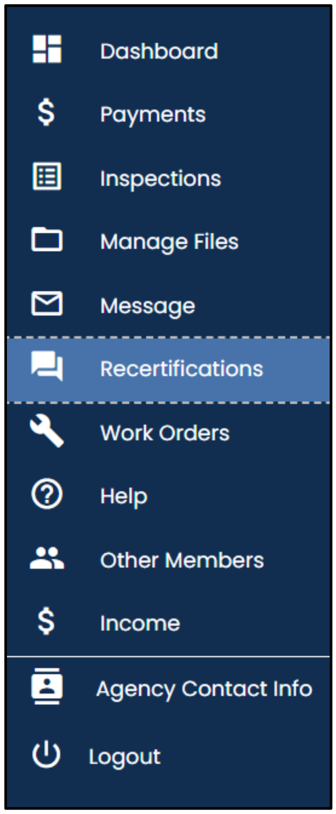
3. Click **Send**.



A 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

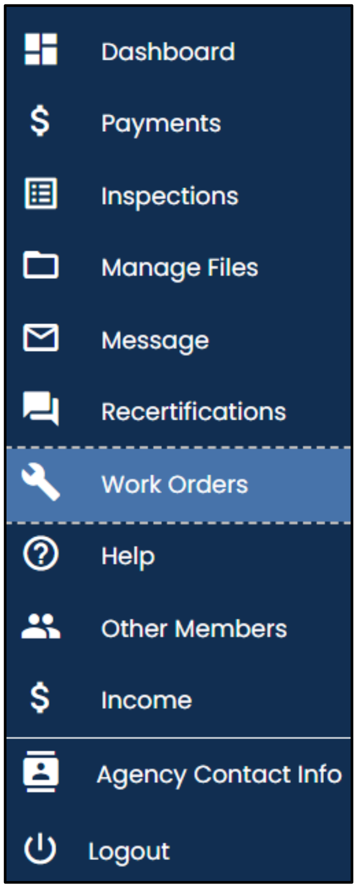


Tenants can view any completed or pending recertifications.

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.

Work Orders

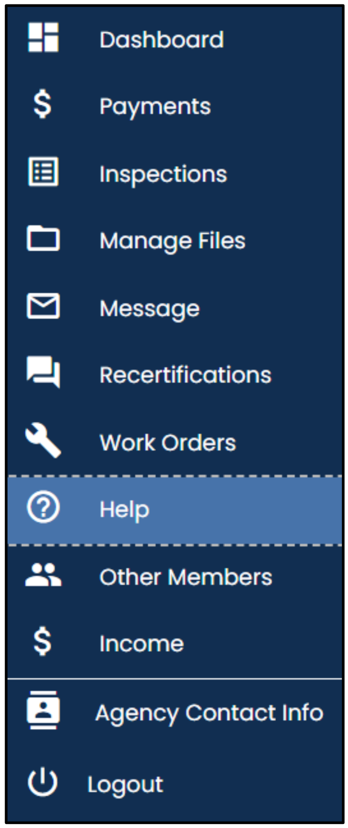


Any Work Orders, completed or pending for the Tenant, is displayed on this tab.

Work orders have the following information displayed.

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

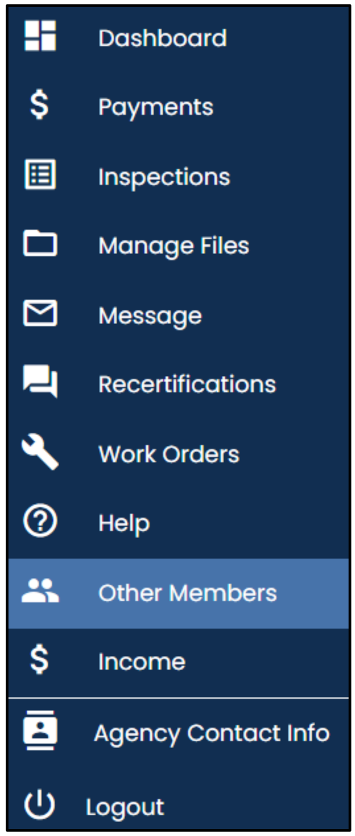
Help



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*

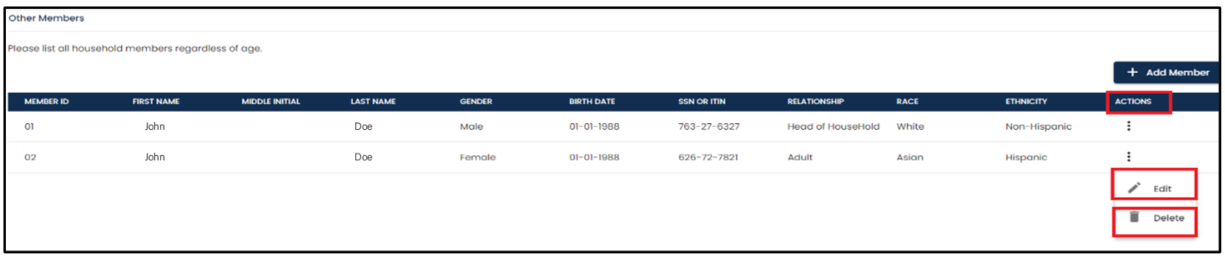
List all household members regardless of their age.

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

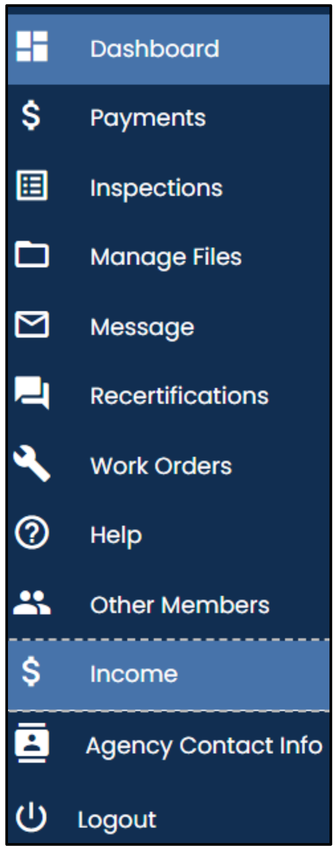
*Some housing authorities require their Tenants to make any needed updates and changes through your Case Worker, not in the portal.   If this option is not available to you, please call your Public Housing Agency.

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**.

Income

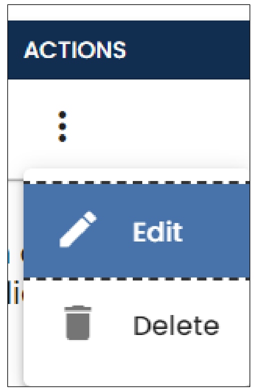


On the Income tab, the tenant can add or edit any income they may have. *

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

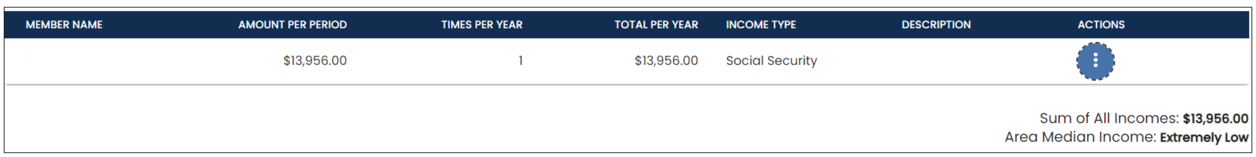
*Some housing authorities require their Tenants to make any needed updates and changes through your Case Worker, not in the portal. If this option is not available to you, please call your Public Housing Agency.

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**.

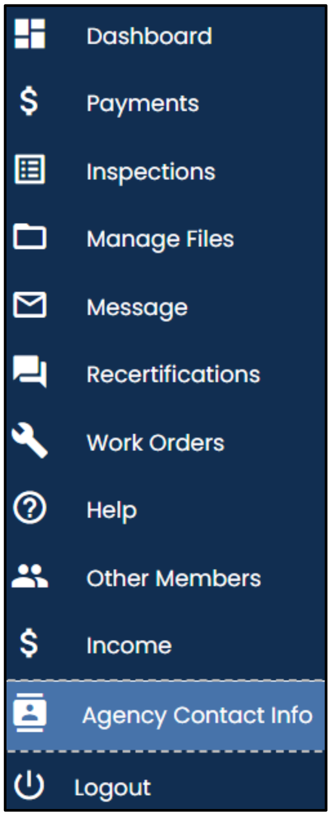
The page displays the sum of all incomes. In addition, it shows the Income level for the family.



MEMBER NAME	AMOUNT PER PERIOD	TIMES PER YEAR	TOTAL PER YEAR	INCOME TYPE	DESCRIPTION	ACTIONS
	$13,956.00	1	$13,956.00	Social Security		

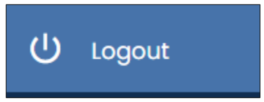
Sum of All Incomes: **$13,956.00**
Area Median Income: **Extremely Low**

Agency Contact Info



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

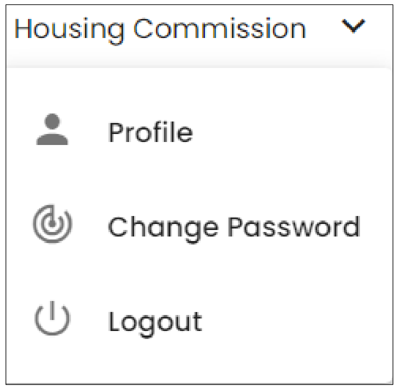
Logout



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

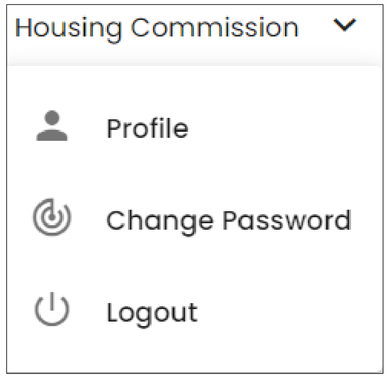
Profile

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



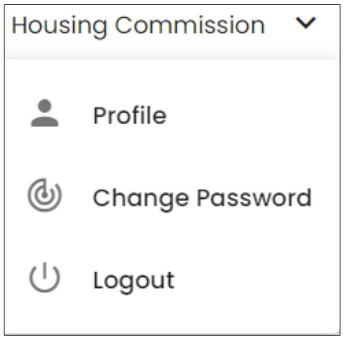
1. Click **Profile** and make the required changes.
2. Click **Save**.

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**.

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.