RightSource

Introduction

Welcome to Certenant, RightSource's document and audit manager. We've designed all of our features to save you time, increase your ability to track and report data, and encourage timely and useful communication.

Using this application, you may:

- Upload new certification documents for audit
- Communicate with your auditor via the communications tool
- Track where the document is in the auditing process
- Access a findings checklist for issues that need addressing
- Re-upload documents in response to any findings the auditor may have
- Compile and print reports

For quick answers to specific questions, please visit our "How Do I . . ." section.

Let's get started!

- Sign in
- Quick Guide: Certification Audit Process
- Reports

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Step-by-Step

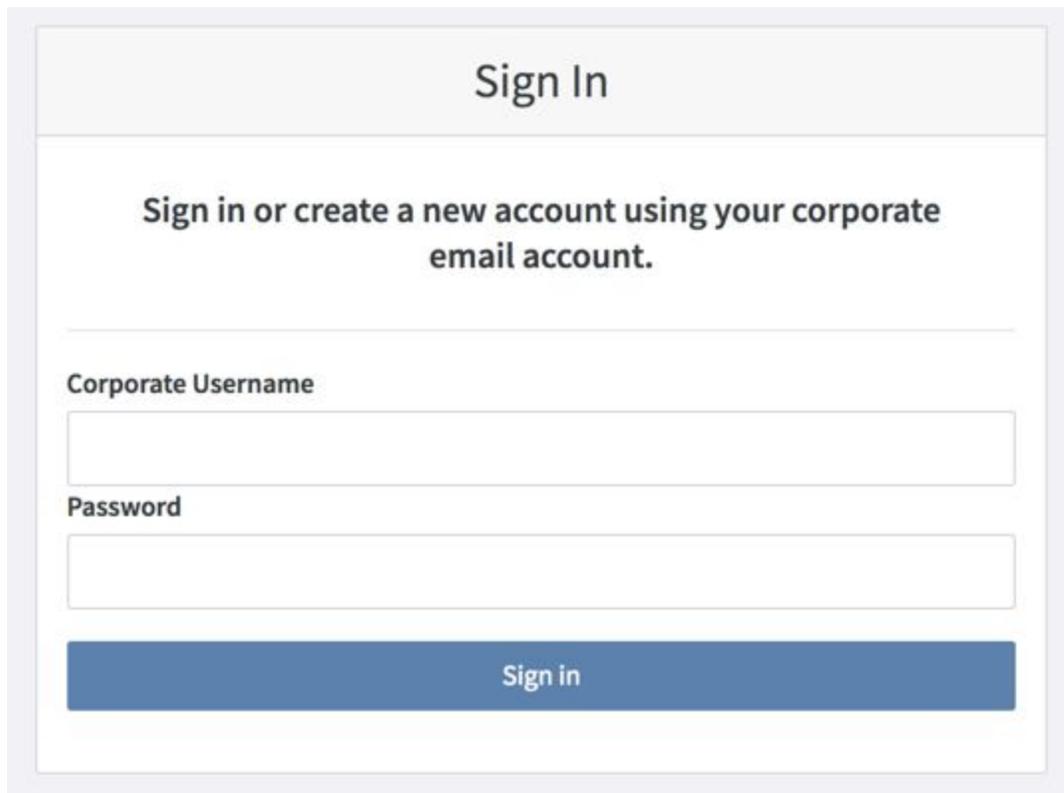# Signing in to Certenant

First, visit:
https://pinnacle.certenant.com/signin

Enter your corporate email address and the password your administrator has given you.

You will navigate to the Properties Page automatically.

Quick Guide for Site Staff

Certification Audits

Certenant facilitates open, timely communication and streamlines tenant paperwork validation.

Here's how to get started.

First: Upload a certification document

We highly recommend using Certenant's forms. They are already compliant with state and federal requirements, and will allow for automatic pre-filling of information.

1. Select the text link name of the property, then the certifications tab
2. Select the 'Create Certification' button and input unit number
3. Select existing or add new tenant
4. Upload file
5. Add any notes you have regarding the document
6. Select 'Save'

The status of the certification will read 'Ready for Review,' and it is now in an auditor's hands.

Second: Stay in-the-know

1. You will know that an auditor has begun reviewing your certification when the status of the document changes to 'In Progress.'
2. If an auditor finds that the certification is complete without any need for modifications, the status will change to Approved. There may be actions still needed in the form of FYI findings. If the status is Complete or Unqualified, you will receive an email telling you of this change.
3. You will also receive an email if the auditor needs more information from you, either in the form of an email that the audit is incomplete or if the auditor leaves a comment for you in the Certification Detail Page.

Third: Update and Communicate!

1. When your auditor publishes an audit by changing its status, you may view their findings and ask questions in the Communications tab of the Certification Detail Page.
2. Use the auditor's findings to correct or more fully complete certification documents, and upload the new documents at the Document Viewer or the property's Certifications tab.

3. This will begin a new audit of the new document, and you can view each document that you upload as part of the history of the audit.

At any point in the process, if the auditor has any questions, or if you do, the two of you can easily and quickly communicate in the Certification Details section through the [Communications tab](#). The system will send email notifications when new comments have been made.

For more information

- For more detailed, [step-by-step instructions on uploading certification documents](#), see the Quick Guide to Certification Audits for site staff.
- For a more thorough description of the communication section, visit the [Certification Detail Page](#) section.
- Find [detailed information](#) on where you may track where the certification document is in the review process.
- To learn more about how to view history, findings, and other notes, visit the [Certification Details Page section](#).

Step-by-Step

Using Certenant with Yardi Voyager®

If you are already using Yardi Voyager®, you can quickly access, link, or create records within Certenant from Yardi Voyager®.

After your administrator has set up the connection, you can transition seamlessly between Yardi Voyager® and Certenant from the tenant record.

From login:

1. From the tenant record, select the Data dropdown from the resident header
2. Select 'Certenant'
3. This will take you to Certenant's login page. If you aren't already, you will need to <u>sign in.</u> [link to sign in section]
4. If this tenant already exists in the Certenant database, you will automatically navigate to their tenant page.

If the tenant doesn't already exist in Certenant, you will automatically navigate to a 'No Matches Found' page. From there, you may:

● Select the correct tenant from the list of suggested records provided, or
● Select 'Create a new person record' and input the building name.

This will create a new tenant record in Certenant pre-filled with the information you've already entered into Yardi Voyager®.

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For Site Staff

How do I . . .

Upload a certification document for review?
Properties Page —> Individual Property —> Certifications Tab —> Create Certification button

1. Input the tenant's unit number.
   a. If a tenant in that unit already exists in the system, this person will autofill the next screen -- although you may change this information by selecting 'Applicant' instead of the tenant's name.
   b. If multiple tenants exist at that unit, you will have the chance to select the correct tenant.
   c. If the tenant does not already exist in the system for that unit, you may enter their information.
2. From this screen, you must select the certification type, effective, and renewal dates. If your property contains units serving different programs, you may change from the default program if needed.
3. Then, select the 'Choose file' button.
4. You must upload documents in .pdf format.
   a. We strongly encourage the use of Certenant's pre-created forms. These will auto-fill programs, addresses, and tenant information — saving you time and connecting seamlessly with our interface.
5. You may then add any notes you would like the auditor to see regarding the document, and save.
6. This creates the cert and puts it into the ready for review status.

Update a certification audit with a new document?

When you receive notification that a certification audit needs updated materials, there are multiple ways to update:

1. From the Certs Detail Page: select 'Update Document'
2. From the Document Viewer: select 'Update'
3. From the Individual Property Page, Certifications tab: select the 'Update' button to the right of the certification

Then, at the popup:

- Select the 'Choose File' button
- Select a .pdf from your desktop (other file formats are not permitted)
- Add any additional notes regarding the document you would like into the text field
- Select Save

Track where the certification document is in the review process?

Check your email: Certenant emails users when a file they have uploaded changes status, so you can keep up-to-date automatically.

Take a peek: To check on a specific certification,

1. Visit the Property Page.
2. Next to each property, you will see numbers to show you how many certifications are in each status.
3. Selecting a number will display a list of which certifications are in that particular status.
4. You may view the individual certification from that screen by selecting 'View.'

See how many certifications are being processed or have been approved for my properties?

To take in all of your properties and their certifications in a glance, take a look at the Properties Page.

1. Next to each property, you will see numbers to show you how many certifications are in each status type.
2. Selecting a number will display a list of which certifications are in that particular status.
3. You may view the individual certification from that screen by selecting 'View.'
4. To view all certifications uploaded for a particular household, select the head of household's name.

To see all of the certifications in all statuses for a particular property:

1. Select the property name from the Properties page
2. And then the certifications tab.
3. You will see a sortable and searchable list of all certifications for the property, along with their status.

If you need information beyond the certification audit status, you can use the communications tool in the Certification Detail Page to ask your auditors a question, or provide them with further information.

Communicate with my auditor about a particular certification?

The communication tool built into Certenant's interface makes communicating with auditors easy -- as well as tracking those communications.

Find the communication tool by selecting a certification, which navigates to the certification details page.

From there, you can subscribe to receive a notification about all communications, leave comments and questions for the auditor working on the certification, track phone calls and emails, and view certification details.

Visit the Certification Details section for step-by-step communications tool instructions.

Add TRACS Sent Date?

Property Certifications tab —> 'Update TRACS' button —> Update TRACS modal —> add TRACS Submission Date

- Key in new date using DD/MM/YYYY, or
- Choose dates from dropdown calendar and select 'Done.'
- Select 'Save'

This will automatically trigger a task for those with the correct credentials to perform: 'Run EIV Income Report.'

- The task will be set for 75 days after the TRACS submission date, and staff will have 15 days in which to complete this task.
- Those without the correct credentials will not be able to view or complete this task.

Download packets and forms?

To download packets for a tenant or for a property, visit the property page or the tenant tab in the property page, select 'Download forms,' and follow the instructions from there to add household information, program information, and any other needed details. For step-by-step, in-depth instructions, please visit the Packets and Forms Step-by-Step Section.

Track tasks?

Certenant keeps certification-related tasks easily available at the Individual Property Page:

From the Individual Property page, Tasks tab, select the text link of a task and follow the popup instructions. For a step-by-step in-depth description, please see the Tasks Tab section of the Individual Property Overview.

See all findings on my certification audits?

From the top menu, select Reports and run the Findings Summary Report. You can filter by property, date, certification type, and finding type, as well as print or download the report. For more, visit the Reports Overview.

Print a findings checklist for a certification?

Because there may be different times in your workflow that you might want to print out a printable .pdf findings checklist, we have given you the opportunity to do so from many places in the application.

From the Document Viewer, select the ⋮ actions menu icon at the top of the Findings section and then select 'Print.'

From the Cert Detail Page, select the Findings tab and select the 'Print' button.

From the Individual Property Page, select the tenant tab, an individual tenant, the ⋮ actions menu and select 'View Findings.'

From the Individual Property Page, select the Certifications tab, an individual certification, the ⋮ actions menu and select 'View Findings.'

View a list of tenants with income discrepancies?

From the top menu, select Reports and run the Income Discrepancy Report. You can sort by property and date, as well as print the report. For more, visit the Reports Overview.

Generate a list of all certifications submitted for audit?

From the top menu, select Reports and run the Submitted Certifications Report. You can filter by property, date, certification type, and status, as well as print or download the report. For more, visit the Reports Overview.

Cancel a certification?

From the Actions Menu on the certification tab of the individual property page, select 'Cancel Certification.' In the popup, select the reason for the cancellation, input any comments, and select 'Cancel Certification.'

Overview

Properties Page

To take in all of your properties and their certifications in a glance, take a look at the page that you will default to after logging in: the Properties Page.

1. Next to each property, you will see numbers to show you how many certifications are in each status type:
   - Ready for Review
   - In Progress
   - Incomplete
   - Approved
2. Selecting a number will display a list of which certifications are in that particular status.

3. You may view the individual certification at the [Document Viewer](#) from that screen by selecting 'View.'
4. To view all certifications uploaded for a particular household, select the head of household's name, which will take you to the tenant's section of the [Individual Property Page](#).

To see all of the certifications in all statuses for a particular property:

1. Select the property name from the Properties page, which will take you to the Individual Property Page.
2. Select the certifications tab.
3. You will see a sortable and searchable list of all certifications for the property, along with their status.

If you need information beyond the certification audit status, you can use the communications tool in the [Certification Detail Page](#) to ask your auditors a question, or provide them with further information.

Overview

The Individual Property Page

This is the page where you can:

- Manage certifications and tenants
- Track tasks
- Download packets and forms
- Subscribe to notifications

Top Bar

Here's where you can, from the **Tasks tab**:

- Download forms
- Manage email notification subscriptions [link to glossary]

    Subscriptions —> select checkbox next to subscriptions you wish to receive in the form of email notifications:

    - Property certifications
    - Property tasks

    Select 'Save'

From the **Certifications tab**, you can also upload a new certification document:

- Select 'Create Certification' and follow the directions to upload in the Certification Audits Quick Guide section.

From the **Tenants tab**, you can also create individual new tenants or multiple new tenants:

- For an individual, select the 'Create Person' button
    - Input all required fields
        - Name (This should be the Head of Household)
        - Unit Number
        - Move In Date
    - Input any optional fields that apply
- Select 'Save'

- For groups of tenants, select the 'Import Persons' button

○ Follow the directions at the Import popup to download a .csv file and upload it with your data. See Importing Multiple Tenants for more in-depth instructions.

Tasks Tab

To complete a task, select the task text link, and in the popup:

Select new status from dropdown:

- New
- In Progress
- Resolved
- Complete

If you'd like to change the effective date, select the existing date and either:

- Key in new date using DD/MM/YYYY, or
- Choose dates from dropdown calendar and select 'Done.'

If you'd like to leave a comment or read previous comments on the task, input a comment in the copy box or select the 'View History' text link.

Upload a new document:

- Select the 'Choose File' button
- Choose file from your desktop
- Select the 'Save' button.

For more information on tasks and how this feature can help your efficiency, visit the What Are Tasks section.

Certifications Tab

Sort by:

- Date
- Status
- Submission status
- Created date

To start or continue an audit on an existing certification, select the tenant name and unit number text link and navigate to the Certification Detail page.

Update TRACS by selecting 'Update TRACS' button

Property Certifications tab —> 'Update TRACS' button —> Update TRACS modal —> add TRACS Submission Date

- Key in new date using DD/MM/YYYY, or
- Choose dates from dropdown calendar and select 'Done.'
- Select 'Save'

This will automatically trigger a task for those with the correct credentials to perform: 'Run EIV Income Report.'

- The task will be set for 75 days after the TRACS submission date, and staff will have 15 days in which to complete this task.
- Those without the correct credentials will not be able to view or complete this task.

⠿ 'Actions' menu:

- Update Document (only available to certs Ready for Review or published as Approved, Incomplete, or Unqualified) —> document upload popup
  - Select 'Choose File'
  - Choose file from desktop
  - Select Save
- View Document —> certification document for audit
- View Cert Details —> certification detail page
- View Findings → Shows the findings checklist.
- Mark As Duplicate —> popup allowing removal of certification. Select 'Mark Duplicate.'
  - *This this will remove this certification record and document and you will be unable to access it again.*
- Cancel Certification —> popup requiring
  - Reason
  - Comments
  - Select 'Cancel Certification'

Tenants Tab

- Sort by unit
- Select text link tenant name to view certifications for that tenant
- Select edit text link to edit tenant details
  - Name
  - Unit number
  - Move-in date
 - Next renewal date
  - Household makeup

Tasks

Certenant has a built-in way for you to keep track of tasks related to a property or tenant. Your administrator or auditor will create these tasks, which you may use to track the task's progress, take notes, upload documents, or change details such as dates.

HUD properties require submission to the TRACS system, and Certenant helps keeps track of these filings.

TRACS

For HUD properties needing TRACS updating, select the 'Update TRACS' button next to the certification in the Certifications tab of the individual property page:
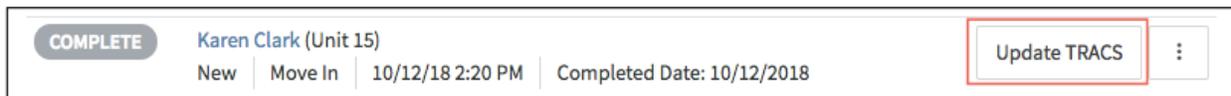
- At the popup, enter the date you submitted necessary documents to TRACS
- From the dropdown, the custom date option will open up fields you may either directly type the date range into using MM/DD/YYYY format, or you may select the calendar icon and browse for the dates you need
- Select 'Save'

This will automatically trigger a task for those with the correct credentials to perform: 'Run EIV Income Report.'

- The task will be set for 75 days after the TRACS submission date, and staff will have 15 days in which to complete this task.
- Those without the correct credentials will not be able to view or complete this task.

Other Tasks

Administrators and auditors can create one-time tasks, such as filing special claims, or repeat tasks, such as pulling quarterly vacancy reports.

To record that you have completed a task:

Top Menu → Properties → Individual Property Page → Tasks tab

Select from the list of tasks, organized by:

Type	Person	Status	Start Date	Due Date

Select task

In popup, view:

- Property
- Person
- Last comment
- History
  - Select the View History text link to open a popup with comment, status changes, and document upload history
- Status
- Effective Date

You may:

- Change the status
  - New
  - In Progress
  - Resolved
  - Complete
- Comment in the text field
- Upload a new document
  - 'Choose file' button'
  - Select .pdf from desktop

After you've made your updates, select 'Save.'

Step-by-Step

Importing Multiple Tenants

Certenant allows you to save time by importing multiple households at once.

Property Page → Individual Property Page → Tenant tab → Import Persons button

From the popup, follow the instructions:

- Download example .csv file
- Open with a data program such as Microsoft Excel*
- Remove the pre-filled examples
- Enter new data into the form
- First name, last name, unit, and move-in date are all required fields
- Acceptable date formats are YYYY/MM/DD, or MM/DD/YYYY.
- To assign tenants to a specific building, use one of the options in the Available Buildings box on the popup, exactly as written
  - Tenants assigned to an incorrect or no building will be automatically assigned to the property's first building
- Save the document as .csv
- Upload your .csv file
- Select 'Choose File'
- Select 'Import'

After importing, Certenant will alert you to any duplicates, errors, or incomplete data, and will give you options to enter and sort more information.

After reviewing any errors, visit the tenants tab to ensure that your tenants have all imported correctly.

A note regarding exporting of files:

The best programs for exporting to .csv are Excel or Google Docs. Other programs such as Pages for the Mac will add in an extra column, causing the upload to fail.

Step-by-Step

Forms and Packets

Certenant's forms and packets come pre-filled with the correct information you'll need for tenants and properties. They are easy to customize, download, and print.

Downloading forms and packets for properties

Properties → Individual Property Page → Download forms

From the Download Forms Page, input:

- Number of Household Members
- Number of Adults
- Answer: Adults are married?*
- If your property contains units serving different programs, you may change from the default program if needed
- Select which types of packets or forms you need:
    - Packets: self-contained groups of forms needed to start whatever is needed for this tenant, based on the number of household members, their marital status, and any other requirements
    - Forms: individual forms you may need for specific instances, grouped by type of form. For instance, Income or Expense. Forms might be specific required affidavits, medical expense verifications, etc.
- Select the 'Generate' button to download the forms.

Downloading forms and packets for tenants

Properties → Individual Property Page → Tenant tab → Individual Tenant → Download forms

Follow the above steps for forms and packets that may be pre-filled with more individualized information than property forms such as name, unit, etc.

Why does it matter if the adults are married?

Depending on the program, it may be optional for married couples to fill out the same form.

Overview

The Document Viewer

The Document Viewer is where you:

- View documents submitted for audit
- Review findings and calculations
- Update documents to address findings

Most of the time, it will look as pictured below, with navigation as indicated:
Page number, increase/decrease commands, and rotation of entire document in lower left hand corner, rotation of a single page in the upper left hand corner:
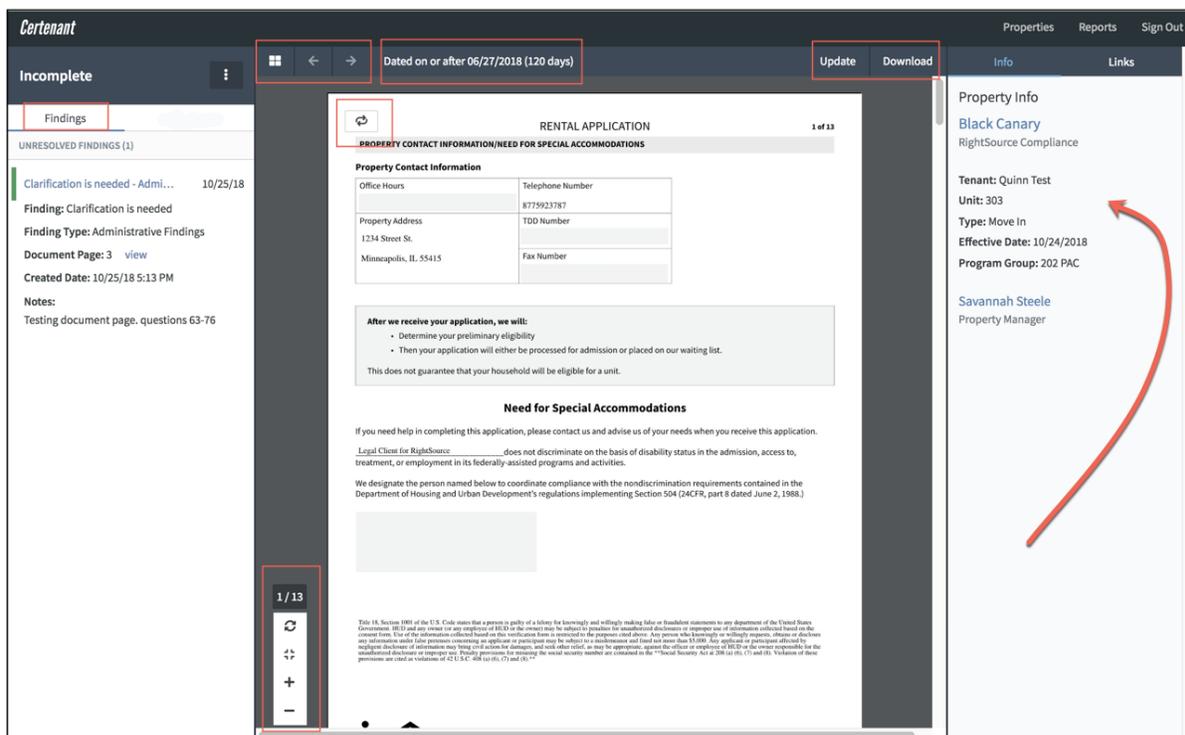
Occasionally, a document will appear that uses your browser's .pdf browsing, zooming, and rotating presets. Chrome, for instance, looks like this:

Stay Informed

- See the property information in the Info tab
  - Property name with text link to property page
  - Tenant
  - Unit
  - Type
  - Effective Date
  - Program Group
  - Property Manager name with link to contact information
- View any findings details in the Findings tab by selecting the text link for each finding, or
- By selecting the ⋮ and choosing to view or print findings to create a Findings Checklist
- Scroll through all uploaded documents with arrows or choose from ⊞ dropdown
- Always see the effective date calculated at the top of the screen
- At the 'Links' tab, find documents that help you to understand requirements

Update

- Upload new documents in response to findings by selecting 'Update' (You may only update when the status of the document is: Ready for Review, Incomplete, or Approved.

You may also download any document uploaded for review at this page by scrolling through the documents and selecting the 'Download' button.

Certification Detail Page

Visit the Certification Details Page by selecting the text link name of a certification.

Properties → Property Name → Certifications tab → (Name of tenant)

Here, you will see basic details on the type and status of the certification as well as dates relating to that tenant's certification.

Communication between site staff and auditors

The communications tab allows you to send and receive messages, track phone calls and emails, and notify others about the discussion. At any time, you may select 'subscribe' to receive notifications of every comment, phone call, and email record associated with this certification.

1. **To communicate** with an auditor or site staff, select 'Comment' under 'New Comment,' add your note or question, and then select the 'Notify' text link to ensure that the correct person gets an email telling them that they have a message.

2. **To reply** to a message, select 'Reply.' The person who started the communication thread will automatically receive messages notifying them of a response.
3. T**o document phone calls and emails**, select:
   - Phone
     - Caller
     - Recipient
     - Time and date of call
     - Duration
     - Select result of conversation from dropdown
     - Enter any notes you have in the text box
     - Notify anyone you'd like to see the call record by selecting 'notify' and choosing the person from the dropdown

   - Email
     - Sender
     - Recipient
     - Date and time of email
     - Enter the message, and notify anyone you'd like to see the email record by selecting 'notify' and choosing the person from the dropdown.

Documenting these calls and emails in a central location helps auditors who may be working together stay up-to-date, and creates a single record for all communication about a certification. You will also find this useful if you are using our compliance support services -- our team of compliance specialists are available to assist in times of heavy workloads or with especially complex cases.

Checking Findings and History

After an auditor has published a review by changing its status, site staff may view any issues the auditor found (called 'findings.')

To view findings, select the 'Findings' tab. Site staff will either see that there are no findings, or a list of what the auditor found that needs attention. For more details or to print, select 'view' or 'print.'

When you select the 'History' tab, you will find a list of documents that have been uploaded for this audit by:
- Upload Date
- Uploaded By
- File Name
  - To view the file, select the text link file name.

You may also view details about findings and history at the Document Viewer section.

Updating

When an auditor has asked for more information and you wish to update the document, select the 'Update' button to upload a new certification document.

You may also update the document in the Document Viewer and the Individual Property Page, Certifications tab.

Overview

Reports

Certenant provides detailed, clear reports on your certification audits that you can print or download.

Please remember to take great care when printing or downloading reports containing personal identifying information (PII), ensuring you are following your company's or HUD's security protocol (when applicable).

To run up-to-the-minute reports, visit the Reports Page from the top menu.

Canceled Certifications Report

To view a list of canceled certifications, run the Canceled Certifications Report.

- **Select the Canceled Certifications Report from the dropdown and select the 'Run Report' button.**

For a more specific report or one with a different timeframe, use the dropdowns to filter by:

- **Property**
- **Cancelled Date** (past 7 days, 30, or a custom date)
  - With custom dates, use the dropdown datepicker 🗓 or enter the dates in MM/DD/YYYY format)
- **Certification Type** (such as Move In, Annual Certification, Interim Recertification)

Once you have run the report, you may download the data as a .csv file for your records.

For more details on what you'll find in the Canceled Certifications Report, please visit the Canceled Certifications Report Step-by-Step.

Effective Date Report

To create a list of certification audits by effective date, run the Effective Date Report.

- **Select the Effective Date Report from the dropdown and select the 'Run Report' button.**

For a more specific report or one with a different timeframe, use the dropdowns to filter by:

- **Property**

- **Effective Date** (past 7 days, 30, or a custom date)
    - With custom dates, use the dropdown datepicker ▢ or enter the dates in MM/DD/YYYY format)
- **Certification Type** (such as Move In, Annual Certification, Interim Recertification)
- **Status** (such as Ready for Review, In Progress, or Approved)

Once you have run the report, you may use the buttons to either print it or download the data as a .csv file for your records.

For more details on what you'll find in the Effective Date Report, please visit the [Effective Date Report Step-by-Step](#).

Findings Summary Report

To see published findings on certification documents, run the Findings Summary Report. This report shows you weighted findings only.

- **Select the Findings Summary Report from the dropdown and select the 'Run Report' button.**

For a more specific report or one with a different timeframe, use the dropdowns to filter by:

- **Property**
- **Created Date** (past 7 days, past 30 days, or a custom date -- MM/DD/YYYY)
- **Certification Type** (such as Move In, Annual Certification, Interim Recertification)
- **Finding** (such as missing signatures, clarification is needed, incorrect calculation)
- **Finding Type** (such as application, asset, expense)

Once you have run the report, you may use the buttons to either print it or download the data as a .csv file for your records.

For more details on what you'll find in the Findings Summary Report, please visit the [Findings Summary Report Step-by-Step](#).

Income Discrepancy Report

View a list of tenants with income discrepancy tasks by running the Income Discrepancy Report.

- **Select the Income Discrepancy Report from the dropdown and select the 'Run Report' button.**

For a more specific report or one with a different timeframe, use the dropdowns to filter by:

- **Property**

- **Created Date** (past 7 days, past 30 days, or a custom date -- MM/DD/YYYY)

Once you have run the report, you may use the button to print it.

For more details on what you'll find in the Income Discrepancy Report, please visit the [Income Discrepancy Report Step-by-Step](#).

Submitted Certifications Report

To generate a list of certification documents submitted for audit and selected by created date, run the Submitted Certifications Report.

- **Select the Submitted Certifications Report from the dropdown and select the 'Run Report' button.**

For a more specific report or one with a different timeframe, use the dropdowns to filter by:

- **Property**
- **Created Date** (past 7 days, past 30 days, or a custom timeframe: MM/DD/YYYY)
- **Certification Type** (such as Move In, Annual Certification, Interim Recertification)
- **Status** (such as Ready for Review, In Progress, or Approved)

Once you have run the report, you may use the buttons to either print it or download the data as a .csv file for your records.

For more details on what you'll find in the Submitted Certifications Report, please visit the [Submitted Certifications Report Step-by-Step](#).

Step-by-Step

Canceled Certifications Report

To view a list of canceled certifications, run the Canceled Certifications Report.

Top Menu → Report → Select Canceled Certifications Report' from dropdown

Before running the report, you may filter by:

- **Property:** from the dropdown, select one property, or show all properties
- **Canceled Date:** (past 7 days, past 30 days, or a custom date -- MM/DD/YYYY)

○ From the dropdown, the custom date option will open up fields you may either directly type the date range into using MM/DD/YYYY format, or you may select the calendar icon and browse for the dates you need
● **Certification Type:** from the dropdown, select a certification type (such as Move In, Annual Certification, Interim Recertification) or show all

After selecting the parameters you wish, select the 'Run Report' button.

The report is organized into sections based on certification:

The top of each section lists the property, tenant name, and unit, and the data for each shows:

● Certification Type
● Created Date
● Canceled Date
● Cancel Reason

Please visit the [Actions Menu section](#) of the Individual Property Page Overview for more information on how you may cancel certifications.

Step-by-Step

Income Discrepancy Report

View a list of tenants with income discrepancy tasks by running the Income Discrepancy Report. Tenants who appear on this report are those that have tasks assigned to them regarding an income discrepancy in their certification document.

Main Menu → Reports → Select Income Discrepancy Report from dropdown

Before running the report, you may filter by:

● **Property:** select all properties or choose a specific property from the dropdown
● **Created Date** (past 7 days, past 30 days, or a custom date -- MM/DD/YYYY)
○ From the dropdown, the custom date option will open up fields you may either directly type the date range into using MM/DD/YYYY format, or you may select the calendar icon and browse for the dates you need

Select 'Run Report.'

The report will provide information in sections by person.

The headline will show the tenant's name, property, and the date the task was reported.

Below that: the status, the document, the created date, the effective date, and a message regarding the task will display.

By selecting 'Print,' you will create a printable .pdf of the report.

Step-by-Step

Findings Summary Report

To see published findings on certification documents, run the Findings Summary Report.

Top Menu → Report → Select 'Findings Summary Report' from dropdown

Before running the report, you may filter by:

- **Property:** from the dropdown, select one property, or show all properties
- **Created Date:** (past 7 days, past 30 days, or a custom date -- MM/DD/YYYY)
  - From the dropdown, the custom date option will open up fields you may either directly type the date range into using MM/DD/YYYY format, or you may select the calendar icon and browse for the dates you need
- **Certification Type:** from the dropdown, select a certification type (such as Move In, Annual Certification, Interim Recertification) or show all
- **Finding:** from the dropdown, select a finding (such as missing signatures, clarification is needed, incorrect calculation) or show all
- **Finding Type:** from the dropdown, select a finding type (such as application, asset, expense) or show all

After selecting the parameters you wish, select the 'Run Report' button.

We have organized the data into these columns:

Property	Finding	Count	Resubmitted Unresolved	Resubmitted New
	The name of the finding	Number of times the finding was submitted	Number of times the same finding was submitted after the initial review	Number of times the finding was made after the initial review

By selecting the titles, you may sort by any of the columns.

You may visit the [individual property page](#) by selecting the text link name of the property.

For more details about a specific finding such as finding types, sources for the findings, etc. you can see what, if any, findings contribute to the overall frequency of occurrence, select the text link name of the finding. You will see the following columns, and you may sort by each column by selecting the heading:

Cert Type	Finding Type	Source	Notes	Resubmitted Unresolved	Resubmitted New	Unit	Person

To visit the property's tab for a particular tenant, select the text link of the tenant's name.

To learn more about the finding type, select the text link name of a finding type. A popup will inform you of the history of this finding -- including the date, status, and notes.

You may also use the Export CSV buttons and Print buttons to either create a printable .pdf file or to download the data as a .csv file, which you can open with any database or spreadsheet program to sort, integrate into other programs, and organize as you wish.

Step-by-Step

Effective Date Report

View a list of certification audits listed by effective date with the the Effective Date Report. This report is helpful in preparing to submit monthly reporting such as the HUD voucher through TRACS.

Top Menu → Report → Select 'Effective Date Report' from dropdown

Filtering

Before running the report, you may filter by:

- **Property:** from the dropdown, select one property, or show all properties
- **Effective Date:** (past 7 days, past 30 days, or a custom date)
  - From the dropdown, the custom date option will open up fields you may either directly type the date range into using MM/DD/YYYY format, or you may select the calendar icon and browse for the dates you need

- **Certification Type:** from the dropdown, select a certification type (such as Move In, Annual Certification, Interim Recertification) or show all
- **Status:** from the dropdown, select a status (such as Ready for Review, In Progress, or Approved) or show all

Once you have run the report, you may sort the report by any of the columns by selecting the name of the column:

Property	Name	Unit	Type	Status	Submission Type	Effective Date	Move-in Date	Created Date
					'New' for the initial upload of a document, 'updated' for documents re-uploaded after the certification has been in the incomplete status, or 'signed,' a document uploaded after the certification has been in the approved status.			

You may also use the Export CSV buttons and Print buttons to either create a printable .pdf file or to download the data as a .csv file, which you can open with any database or spreadsheet program to sort, integrate into other programs, and organize as you wish.