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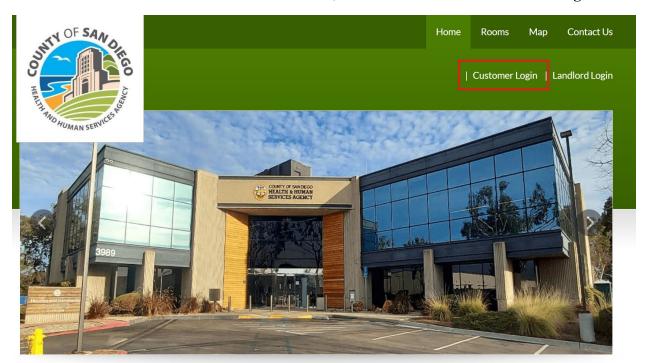
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Completing the Recertification Via RentCafe Portal

Resident Login

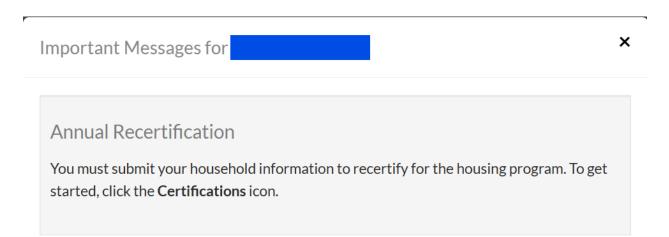
Note: This desk guide outlines the steps for a resident who is already registered to log in to the RentCafe Portal and complete their recertification after receiving their recertification notice and packet.

1. Once the resident is on the Rentcafe Portal, the resident will click Customer Login.

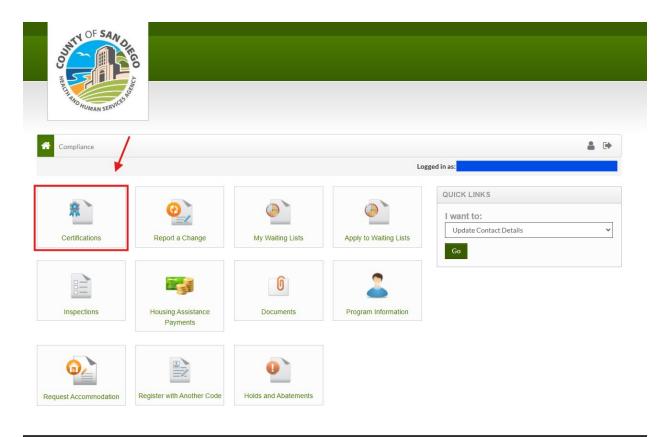


2. The resident will enter their Registered email and Password and will click Sign In. **Customer Login** To create your HACSD account and apply online you must have a valid email address. If you do not have a valid email address, you will need to create one. Please click on the following links to access popular email providers: • Gmail • Yahoo! • Outlook First Time Visitors: Follow the 'Click here to register' link below. Returning Visitors: Login with your email and password. Note: For better use of the Online Portal we recommend using the most recent version of one of the Supported browser's list: Google Chrome Mozilla Firefox Safari (macOS) Opera Email Password

••••• Forgot password? Click here to register 3. The Important Message pop up will appear, notifying the Annual Recertification must be submitted. Resident will click the **X** icon on the pop-up message to continue to the Dashboard.



4. Residents will click on the **Certifications** tile to begin the recertification process.

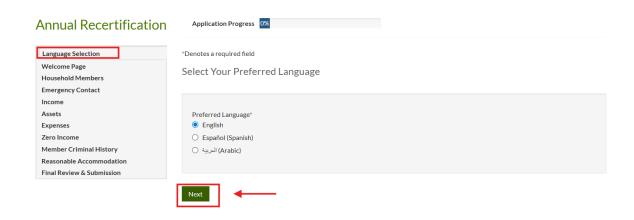


Follow the Annual Recertification Workflow:

5. The resident will navigate through each section using the side menu or by clicking **Next** at the bottom of each page.

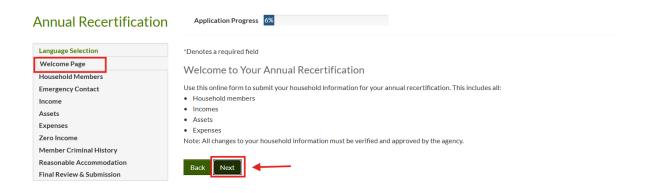
Language Selection

1. The resident will choose a **Preferred Language** from the available options, then clicks **Next** to proceed.



Welcome Page

1. This tab is more Informational, and no action is required, resident will click Next.

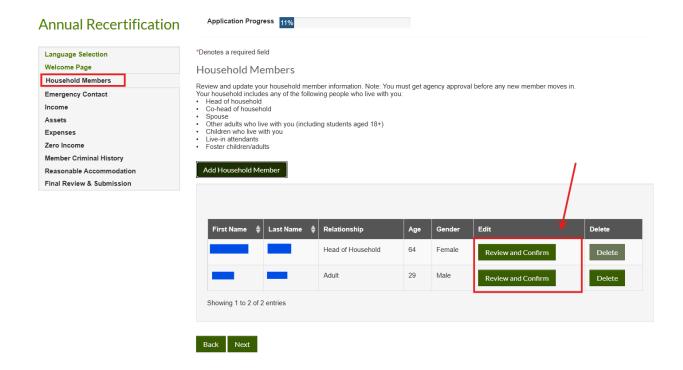


Adding/Reviewing Household Member

All household members will be listed on the table.

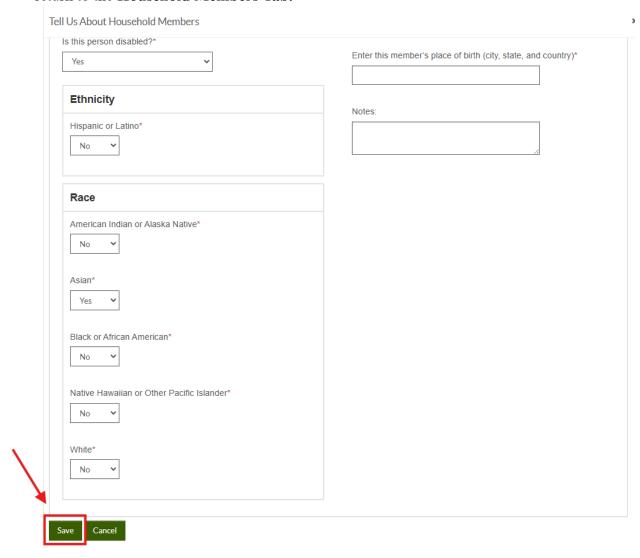
1. The resident will click **Review and Confirm** to verify the information for each member.

Note: If additional members need to be added during the recertification, the resident will click **Add Household Member**.

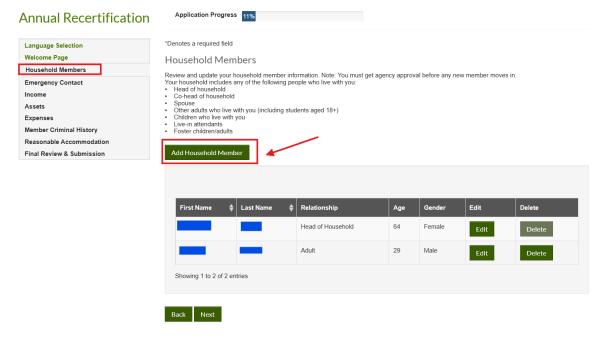


The Tell Us About Household Members' dialogue box will appear:

2. The resident will complete all required fields with an asterisk (*) and click **Save** to return to the **Household Members Tab.**



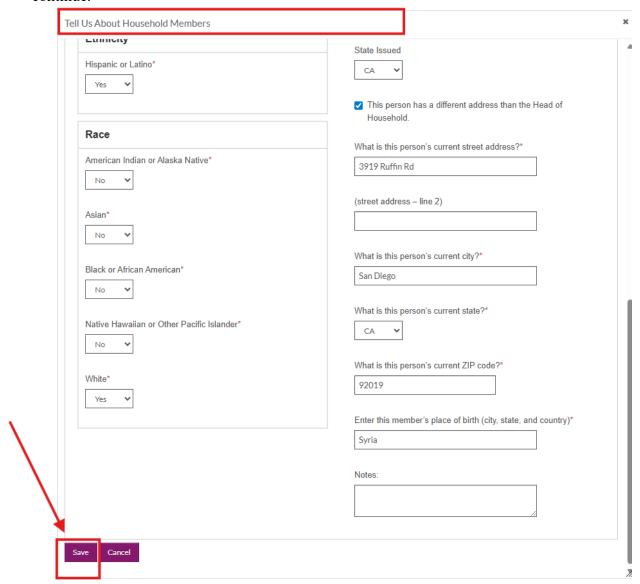
3. Once all Household Members have been reviewed and confirmed, the resident will click **Add Household Member** to add a new **household Member** or **Next** if no additional household members need to be added.



Tell Us About Household Members Member Details First Name* Student Status Middle Name Is this person a United States citizen by birth, a naturalized citizen, or a U.S. national?* Last Name* Preferred Language Other Than English (optional) Date of Birth* Has this person ever used a different Social Security Number?* Social Security Number* Has this person ever gone by a different name?* Gender* Driver's License # or State Issued ID # Relationship to the Head of Household* State Issued Is this person disabled?* Notes: ~ Ethnicity Hispanic or Latino*

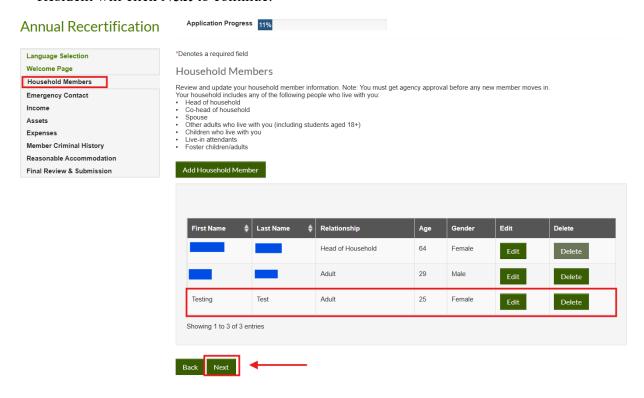
4. The Member Details screen appears, the resident will complete all required fields.

5. Once the resident completes all the required fields, the resident will click **Save** to continue.



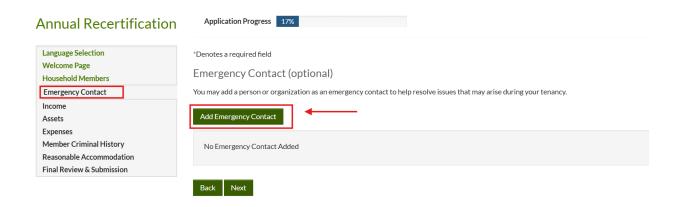
How a Resident Completes the Recertification via RentCafe

6. The newly added household member will appear in the Household Members tab. Resident will click **Next** to continue.



Adding/Reviewing Emergency Contact

1. If the resident wishes to add an emergency contact, the resident will click **Add Emergency Contact.** The information entered here will appear on the Supplemental HUD- 92006 form. The resident will **Add Emergency Contact**.

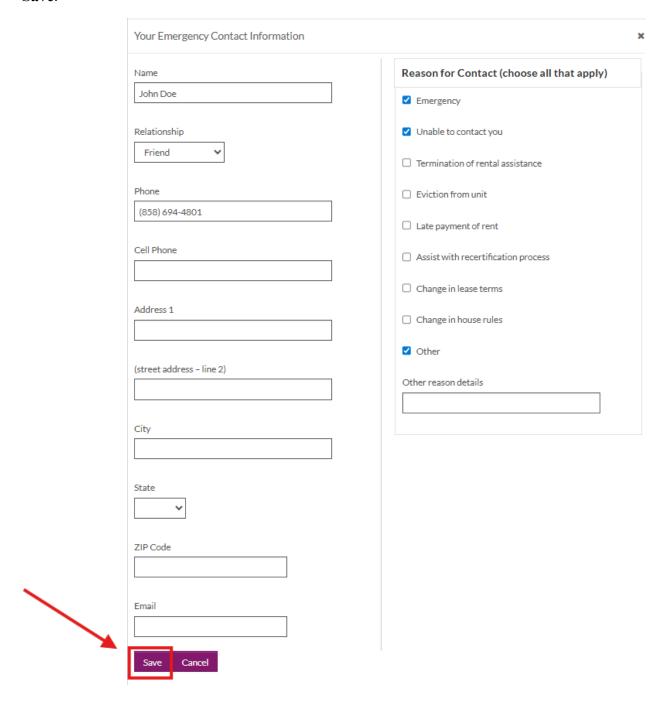


2. The Your Emergency Contact Information screen appears, Resident will enter the information they wish to provide.

Note: The Information provided in screen will populate in the Supplemental HUD form.

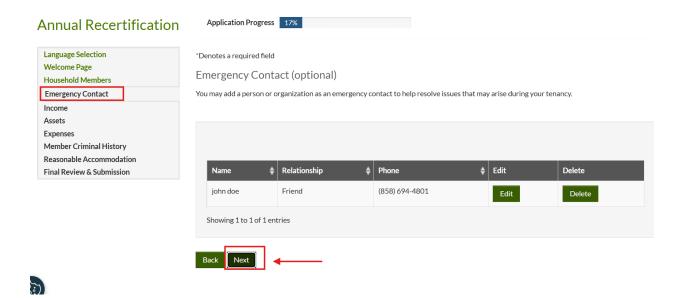
Your Emergency Contact Information	
Name	Reason for Contact (choose all that apply)
	☐ Emergency
Relationship	☐ Unable to contact you
~	☐ Termination of rental assistance
Phone	☐ Eviction from unit
	☐ Late payment of rent
Cell Phone	☐ Assist with recertification process
	☐ Change in lease terms
Address 1	☐ Change in house rules
	Other
(street address – line 2)	
City	
State	
~	

3. Once the resident has provided the information they wish to provide, the resident will click **Save**.



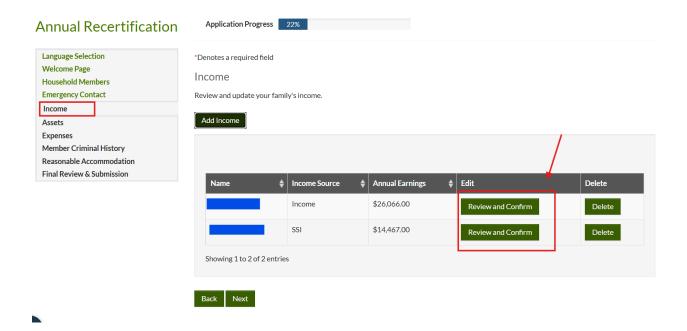
How a Resident Completes the Recertification via RentCafe

4. The Emergency Contact information entered will appear in the Emergency Contact tab, resident will click **Next.**



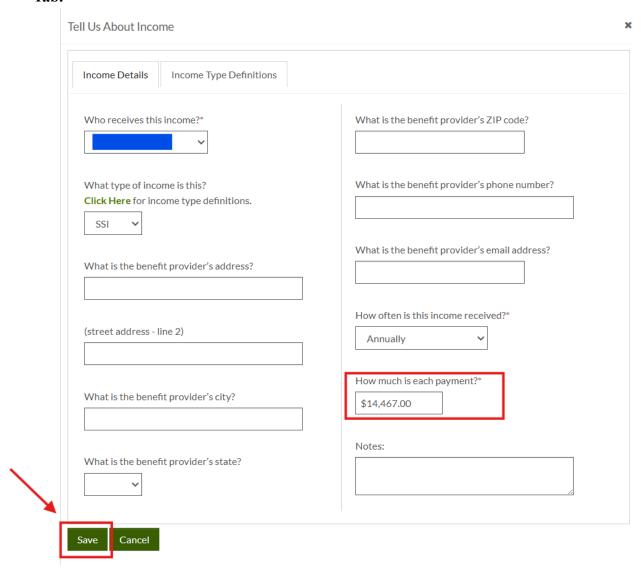
Adding/Removing/Reviewing Income

1. Income sources and annual earnings appear in a table next to each household member's name. Residents will click **Review and Confirm** to review or update the income information. If a household member is no longer receiving an income source, the resident will click **Delete**. If a household is receiving new income, the resident will click **Add Income**.

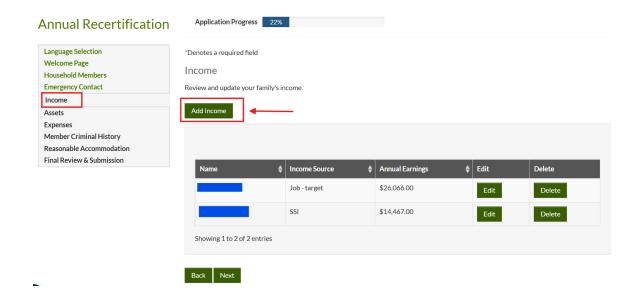


The **Tell Us About Income** dialogue box will appear.

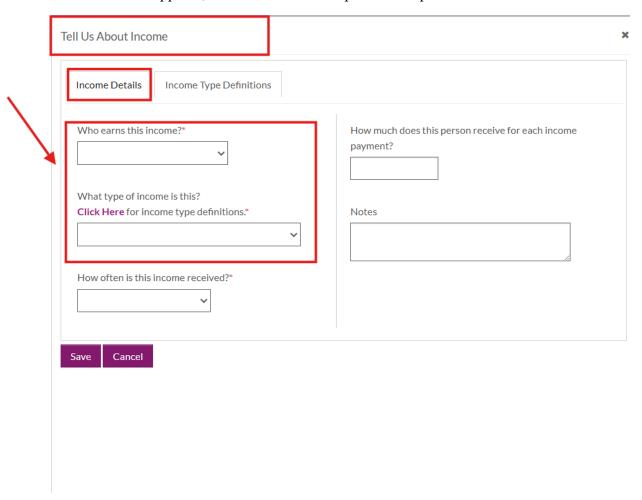
2. The resident will update the payment amount received and, if applicable, the frequency of pay if it has changed. Repeat this process for each individual household member who is receiving income. The resident will click **Save** to return to **Income Tab.**



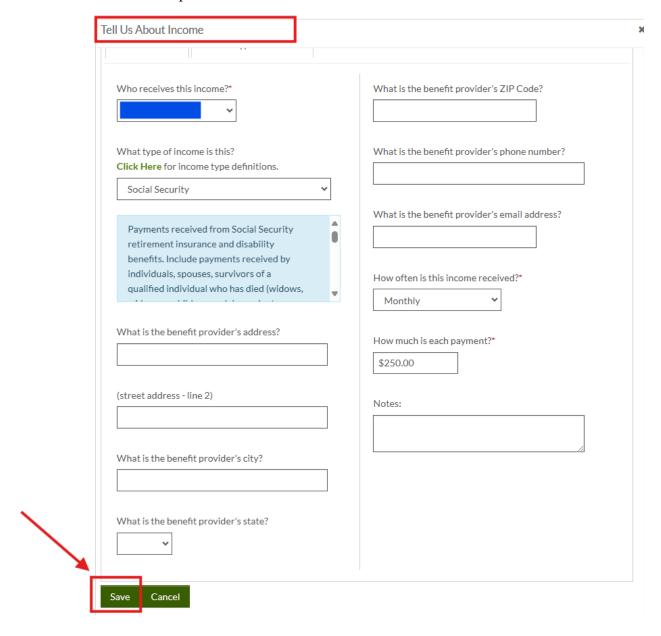
3. The resident will click **Add Income** to add income or **Next** if no new income needs to be added.



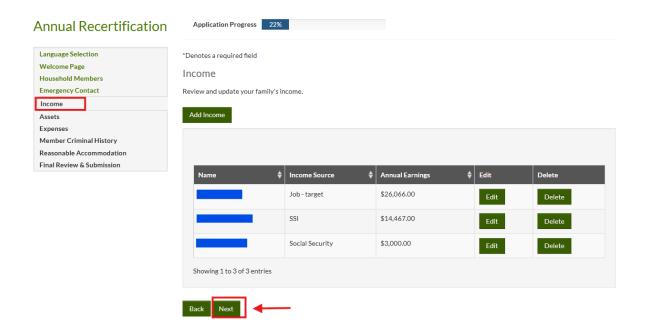
4. The **Income Details** screen appears, the resident will complete the required fields.



5. Depending on the Type of Income being reported, different questions will populate. The resident will complete fields and click **Save.**

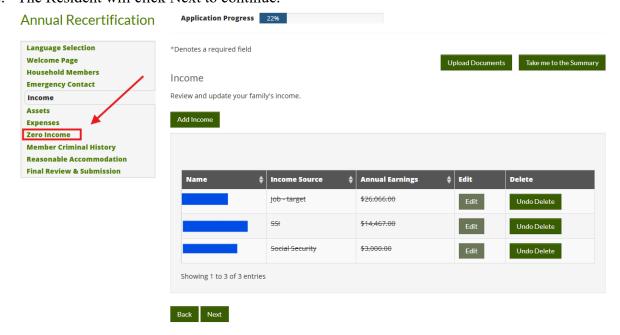


6. The newly added income will appear in the income tab. The Resident will click **Next**.



Zero Income Household

- 1. If a household reports they are no longer receiving income and deletes all income records in RentCafe, the system will automatically populate the **Zero Income** tab on the left side menu. Households with zero income must complete the **Zero Income** section.
- 2. The Resident will click Next to continue.



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- 3. From the **Zero Income** tab, the resident will answer all the required questions.
- 4. The resident will click **Next** to continue.

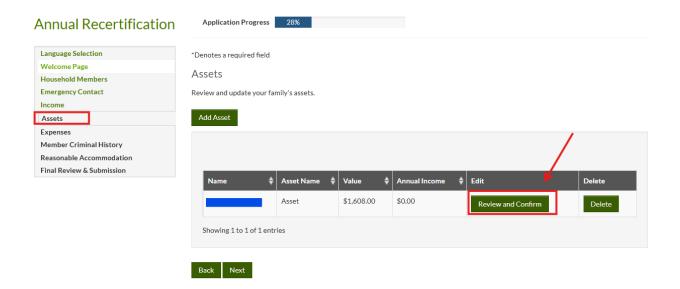
nnual Recertification	Application Progress 39%		
inguage Selection	*Denotes a required field	Upload Documents Take me to the Summary	
ousehold Members	Zero Income	Opioda Documents	
nergency Contact	You reported zero income for your family. Please explain how you	u pay for the following household expenses.	
sets	,		
penses	Please Note: Enter the monthly amount your family spends on each expense. If an expense does not apply to your family, enter "N/A"		
ero Income	in that field and "\$0.00" in the amount field. If someone outside y	our family pays for the expense, enter their full legal name.	
lember Criminal History			
easonable Accommodation	How does your family pay for rent?*	How does your family pay for cell phone/telephone expenses?*	
inal Review & Submission			
	Rent Amount*	Phone Amount*	
	\$0.00	\$0.00	
	How does your family pay for utilities?*	How does your family pay for medical care?*	
	Utilities Amount*	Medical Care Amount*	
	\$0.00	\$0.00	
	50.00	30.00	
	How does your family pay for food?*	How does your family pay for prescriptions or over-the-counter drug expenses?*	
	Food Amount*		
	¢0.00	Prescriptions Amount*	

How a Resident Completes the Recertification via RentCafe

Food Amount*	
\$0.00	Prescriptions Amount*
	\$0.00
How does your family pay for clothing?*	
	How does your family pay for personal care products such as toilet paper, toothpaste, etc.?*
Clothing Amount*	
\$0.00	Personal Care Amount*
How does your family pay for school supplies?*	\$0.00
6	How does your family pay for vehicle insurance, gasoline, maintenance and upkeep?*
School Supplies Amount*	
\$0.00	
	Vehicle Amount*
How does your family pay for childcare?*	\$0.00
	How does your family pay for other transportation needs?*
Childcare Amount*	
\$0.00	
/	Transportation Amount*
⊬	\$0.00
Rack Next	

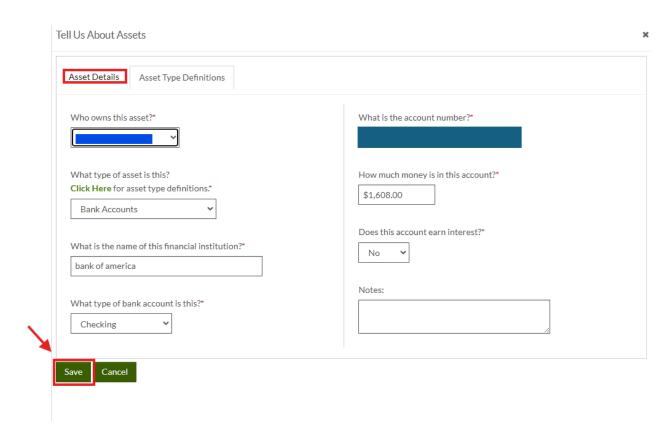
Adding/Removing/Reviewing Assets

- 1. Asset information appears in a table next to each household member's name. Residents will click **Review and Confirm** to review or update the asset details. If a household member no longer has an asset, the resident will click **Delete**. To report a new asset, the resident will click **Add Asset**.
- 2. The residents will click **Review and Confirm** to update the asset information.

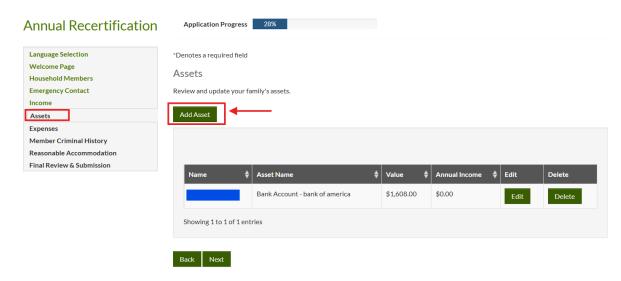


The Tell Us About Assets dialogue box will appear.

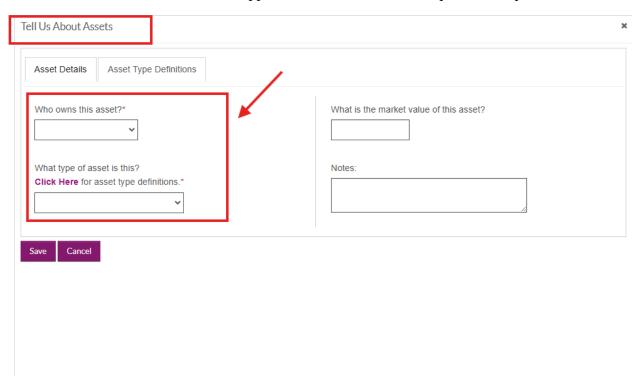
3. The resident must complete all the required fields in the asset detail sections and clicks **Save** to return to **Assets Tab.**



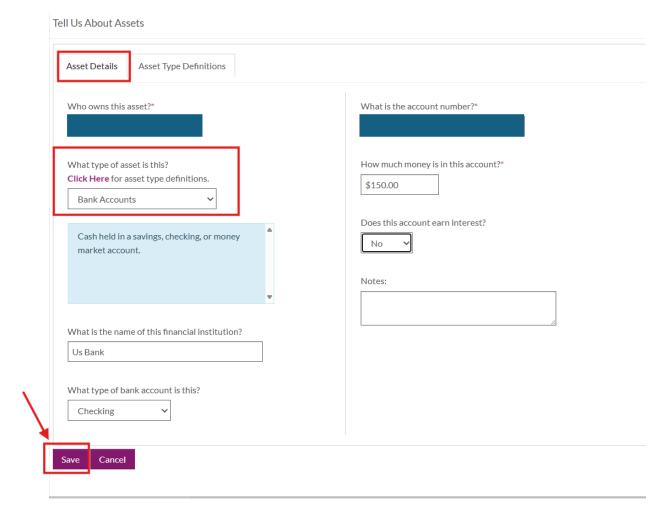
4. The Assets information entered on the previous screen will appear on the Asset table. Resident will click Add New Asset to report a new asset or **Next.**



5. The Asset Details screen appears, the residents will complete the required fields.

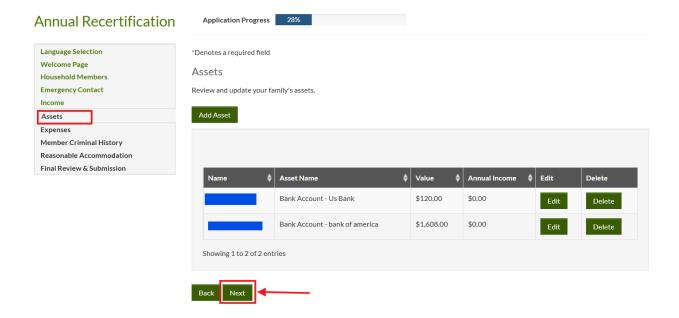


6. Depending on the type of asset being added, different questions will appear. The resident must complete all required fields and then click **Save.**



How a Resident Completes the Recertification via RentCafe

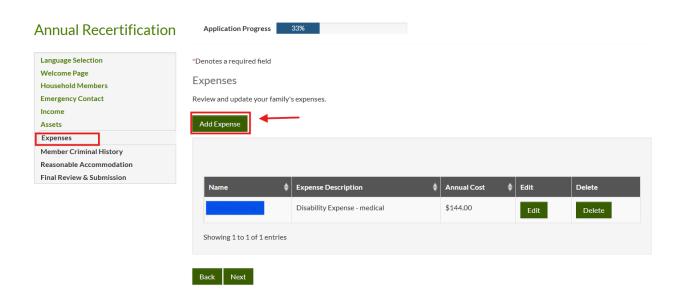
7. Back in the asset section, the newly added record will appear. The resident will click **Next.**



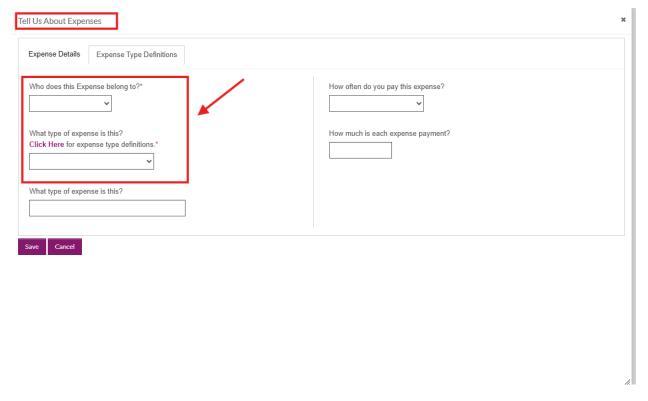
Adding/Removing/Reviewing Expenses

If any household members previously reported expenses, they would appear in this tab.

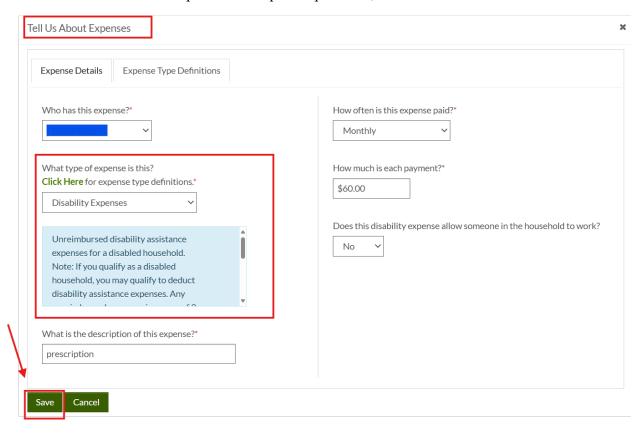
1. The Resident will click **Add Expense** to add an expense.



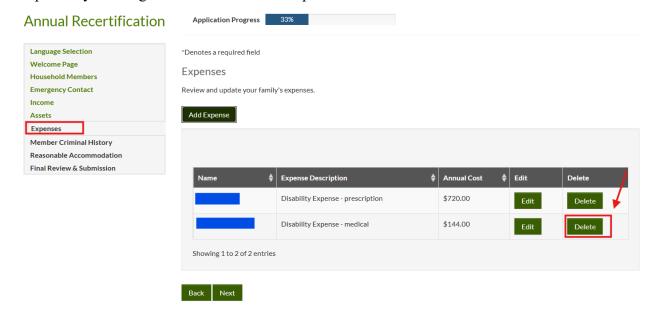
2. The Expense Details screen will appear. The resident will complete all required fields.



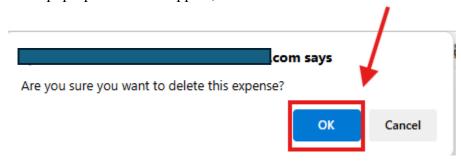
3. Depending on the expense type being added, different questions will appear. Once the resident has completed the required questions, the resident will click **Save.**



4. The newly added expense will appear in the expenses tab. The resident can delete an expense by clicking **Delete** or click **Next** to proceed.

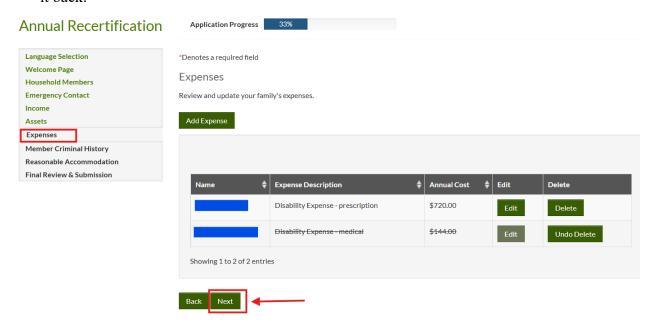


5. A pop-up screen will appear, the resident will click **OK**.



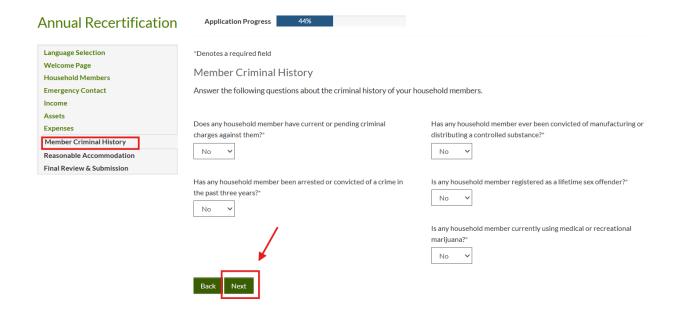
6. The deleted record will appear with a line through it, and the Undo Delete button will be enabled, the resident will Click **Next.**

Note: If an expense is accidentally deleted, the resident can click **Undo Delete** to add it back.



Answering and Reviewing Member Criminal History

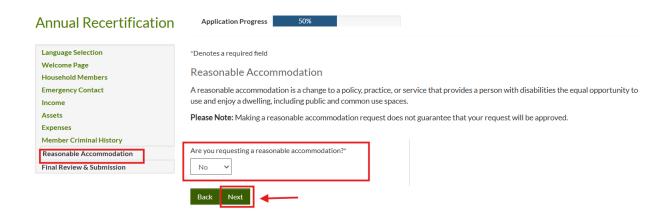
1. The resident must answer all criminal history-related questions. For any questions answered **Yes**, a window will appear requesting the name, date of the incident, city and state where it occurred, and a brief description of the crime. The resident must answer all questions with **Yes** or **No** and click **Next** to Proceed to the **Reasonable Accommodation** tab.



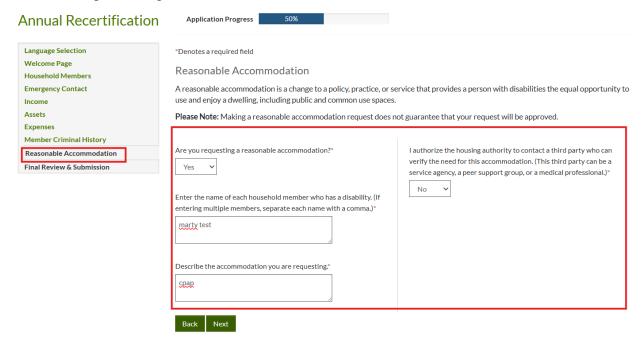
Requesting a Reasonable Accommodation

Residents may request a reasonable accommodation during the annual recertification process.

1. If the residents answers No they are not requesting reasonable accommodation, the resident will click **Next** to proceed.



2. If the resident is requesting a reasonable accommodation, the resident will select **Yes** and complete the questions.

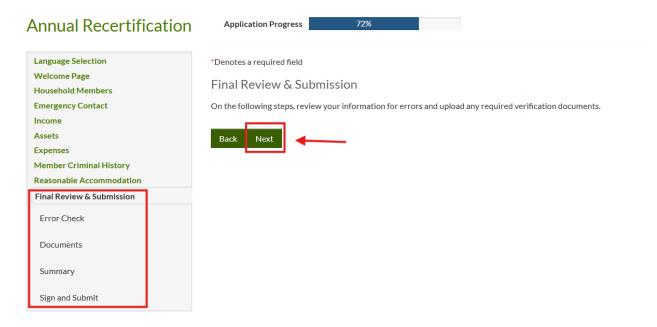


3. The resident may select *Yes* or *No* authorizing HACSD to contact a Third Party. If the resident answers Yes, the questions will populate to complete. Once completed, the resident will click **Next.**

Are you requesting a reasonable accommodation?* Yes Yes	I authorize the housing authority to contact a third party who can verify the need for this accommodation. (This third party can be a service agency, a peer support group, or a medical professional.)*
Enter the name of each household member who has a disability. (If entering multiple members, separate each name with a comma.)*	Yes 🔻
Mary Test	Contact Details to Verify Above Information
	Name*
Describe the accommodation you are requesting.*	Doctor John Do
Extra bedroom for my CPAP machine	Address*
	3989 Ruffin
	(street address – line 2)
	City* San Diego
	State*
	ZIP Code*
,	92123
	Phone Number*
	(858) 694-4801
	Email Address*
↓	johndoe@gmail.com
Rack Novt	

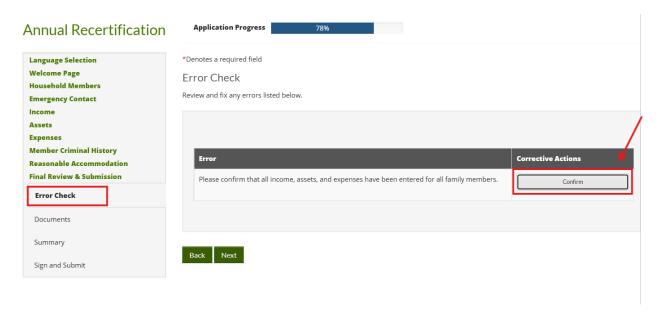
Final Review & Submission

1. The resident will click **Next** to proceed to the next sub-task, such as (Summary, Error Check Documents, or Sign & Submit) as shown on the side menu.

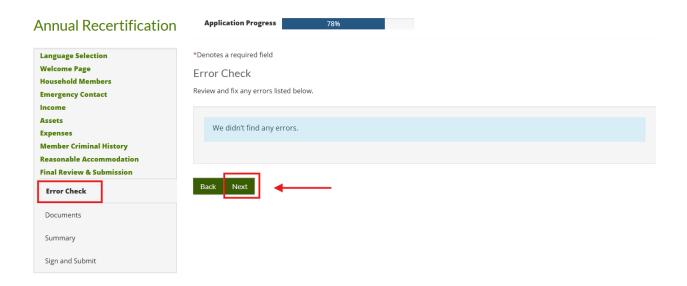


Error Check subtask:

2. The resident will click **Confirm** to resolve all errors.



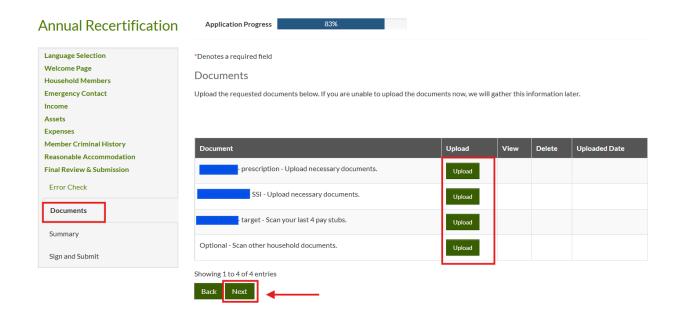
3. Once all errors are cleared, the resident will click **Next** to proceed.



Uploading and Reviewing Documents

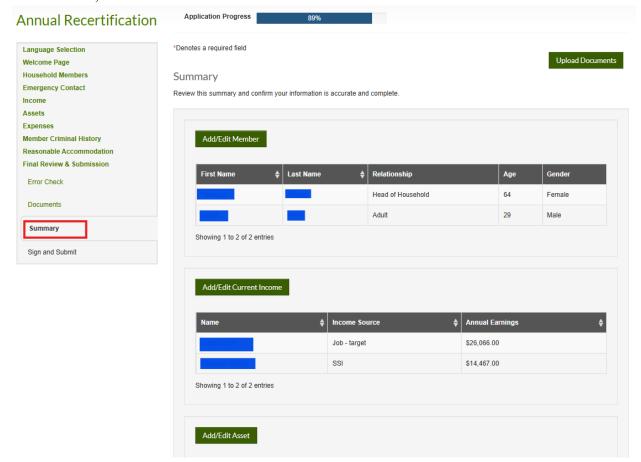
Documents Sub-task

1. Upload all required documents in this section, then resident will click **Next** to proceed.

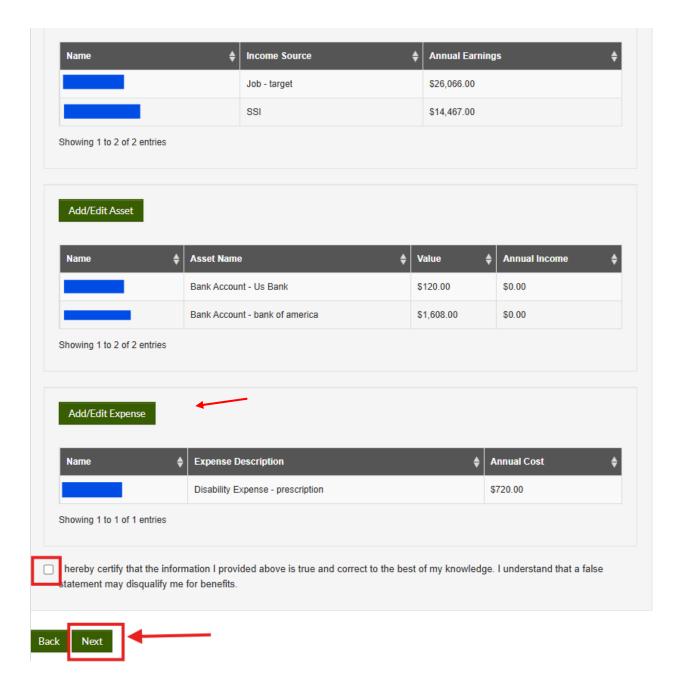


Summary sub-task

2. The resident will review and confirm all information reported is accurate and complete. Scrolls to the bottom and marks the check box recertifying all information is correct, then clicks **Next**.



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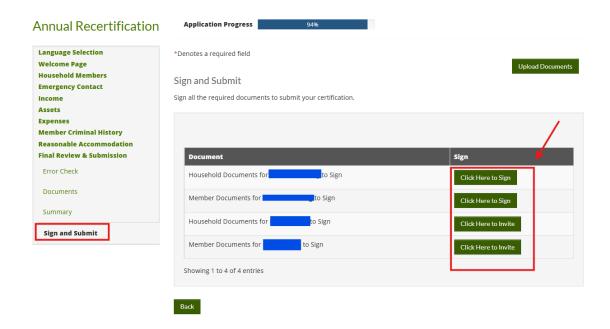


Sign and Submit the Recertificate Certificate

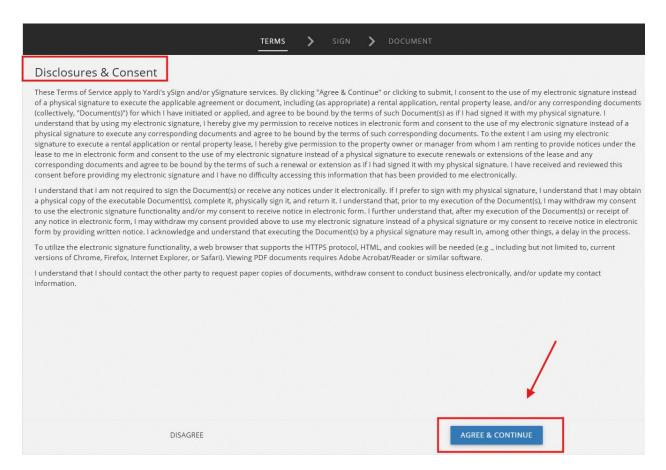
Sign and Submit subtask

- 1. All household members aged 18 and older are required to sign all mandatory disclosures.
- 2. The head of household will begin by clicking Click Here to Sign.
- 3. Other adult household members must be invited to sign their disclosures.

Note: The recertification will remain incomplete until all required adult household members have been invited and have signed their disclosures.

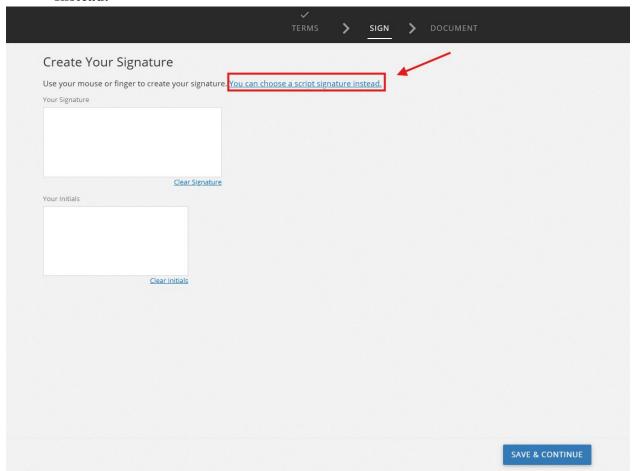


4. Yardi Disclosures & Consent terms appear, the resident will click Agree & Continue to proceed with signing process.

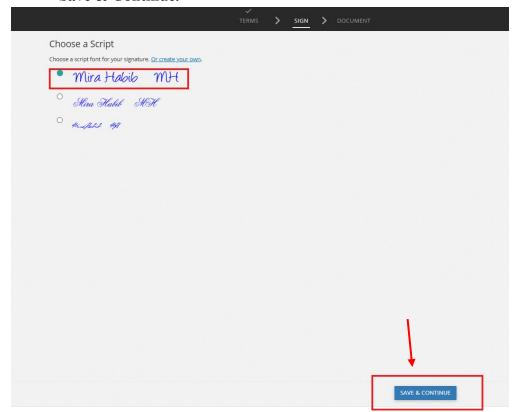


This brings Create Your Signature screen.

5. The resident can sign their signature with their mouse or finger or a scripted style can be selected by the resident by clicking **You Can Choose a Script Signature Instead.**

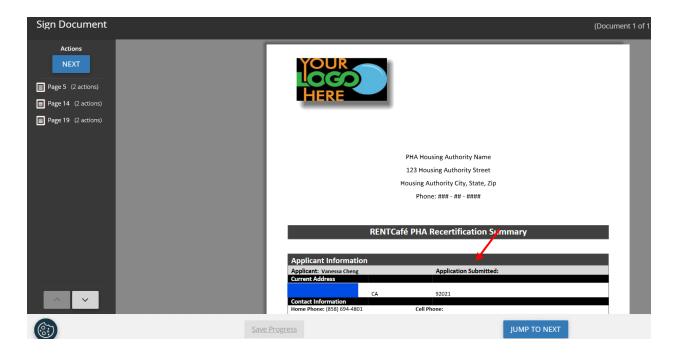


6. Choose a script font for your signature or click **Or Create Your Own** to sign your signature by mouse or your finger. In this scenario, a script font is selected. Click **Save & Continue.**

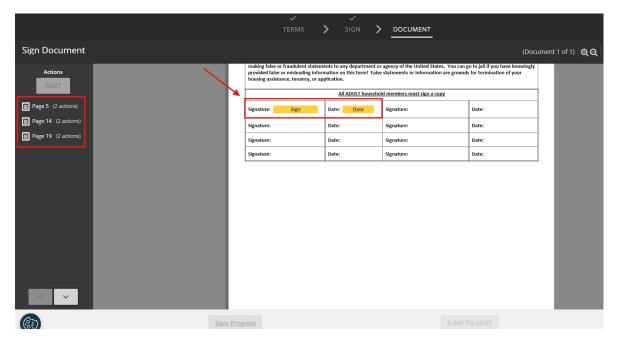


Sign Documents

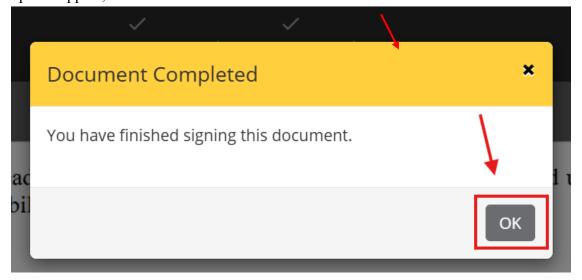
7. The resident can scroll to each signature field or click the blue **Jump to Next** button to jump to next required signature page. The required documents to sign are, Recertification summary, Program Review and Tenant Integrity Program, Statement of Responsibility, Request for Reasonable Accommodation, Supplemental to Application for Federally Assisted Housing HUD-92006, Authorization for Release of Information, Authorization for Exchange of Information with the Health and Human Services Agency.



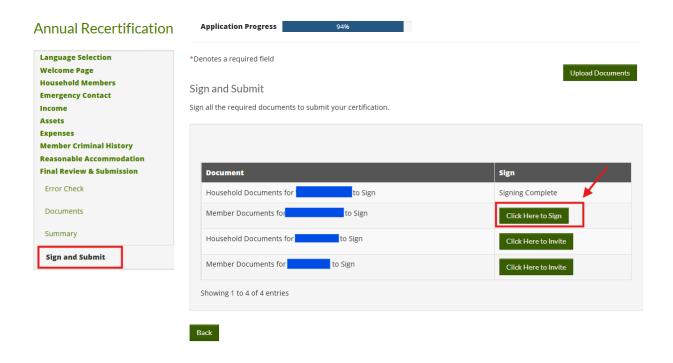
8. Resident will Click the yellow **Sign** and **Date** fields to populate the signature and date. A green checkmark will appear once completed, indicating the section is signed and dated. The resident must click **Jump to Next** to continue.



9. The resident must repeat the same process on each page and click **Jump to Next** to proceed. Once all signature fields are completed, a **Document Completed** popup will appear, then clicks **OK** to finish.

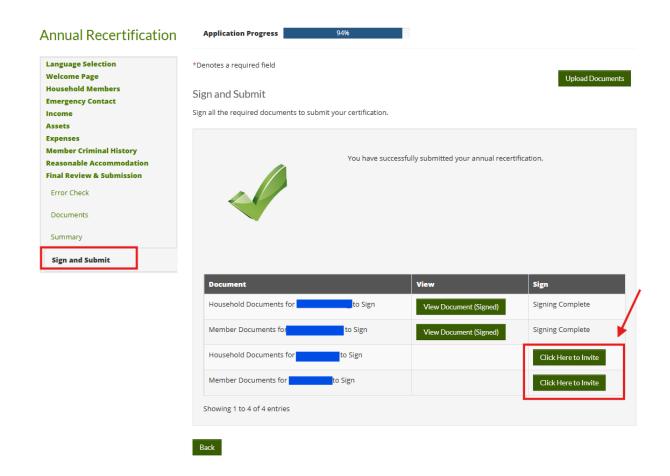


10. Clicking **OK**, returns the resident back to the signature **Sign and Submit tab.** Resident will click **Click Here to Sign** to sign the next set of disclosures.



Invite Other Household Members to Upload and Sign Recertification

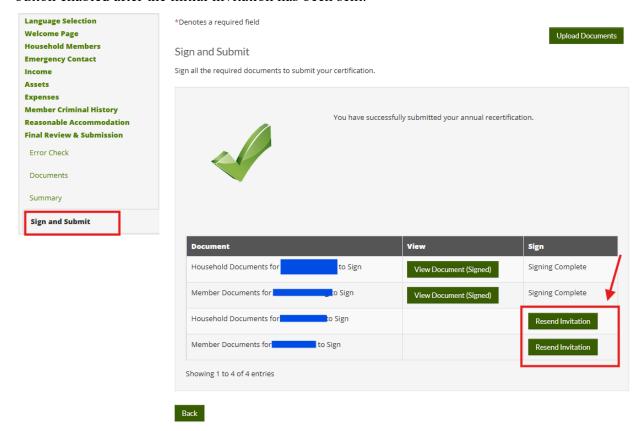
1. Once the Head of Household (HOH) has signed all documents, a green checkmark will appear, they must click **Click Here to Invite** to send the disclosures to the other adult household members for signature.



2. The resident must enter the email address of the other adult household member, include a message to the invitee, then click **Send Invitation.**

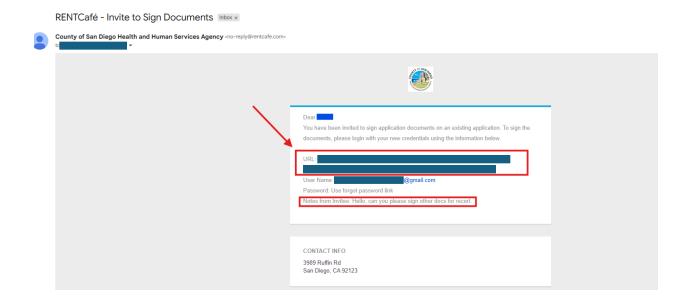


3. When returning to the **Sign and Submit** screen, HoH will see the **Resend Invitation** button enabled after the initial invitation has been sent.



Steps for Other Household Members to Upload & Sign

1. The other household members will receive an email notification indicating they have been invited to sign application documents for an existing application. The email will prompt them to sign in and will include the username provided, along with any note entered by the Head of Household (HoH). The other household member will click on URL in the email.



Accessing the Signature Disclosure

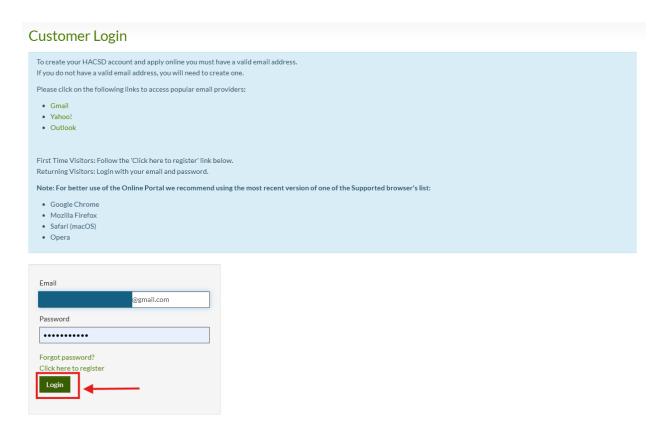
2. When the other adult household members click the link in the email, they will be directed to the RentCafe password setup screen. They must create a password and click **Change Password** to access the **Signature Disclosure** section within the application.



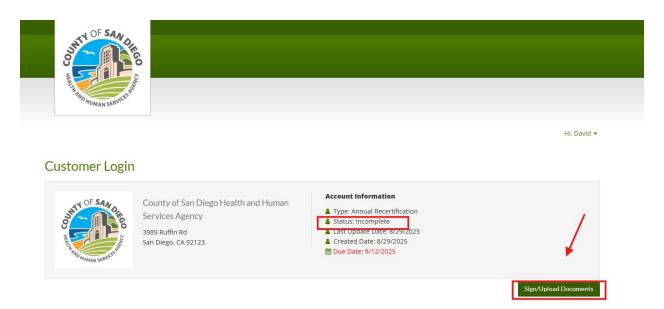
Click here to login.

Logging into the Customer Portal

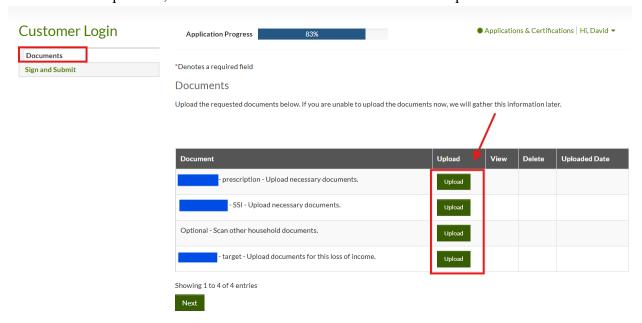
3. After setting their password, the household member will be redirected to the **Customer login screen**. They must enter the **username** provided in the email and the **password** they just created, then click **Login** to access the application.



4. Once logged into the Customer Portal, the adult household member can view account information including type, status, last updated date, created date, and due date. To proceed, click **Sign/Upload Documents**.

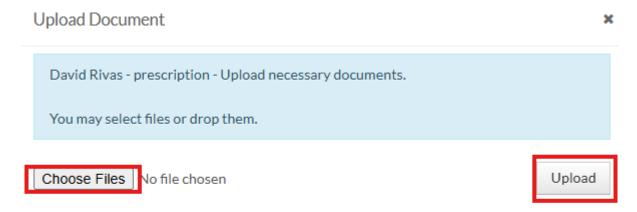


5. From the Customer Portal **Documents** section in the side menu, the other adult household members can upload all required documents by clicking **Upload**. Once all documents are uploaded, the household member should click **Next** to proceed.



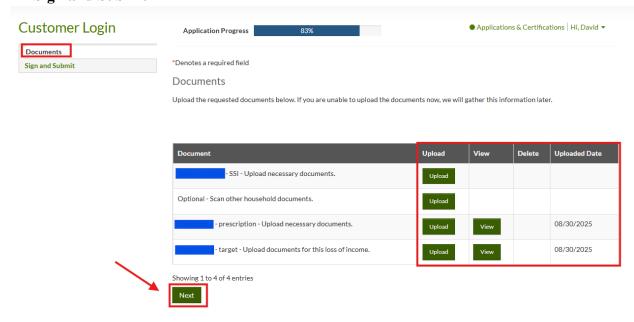
Upload Document

6. The other adult household member will click **Choose Files**, select the desired file, and then click **Upload**.



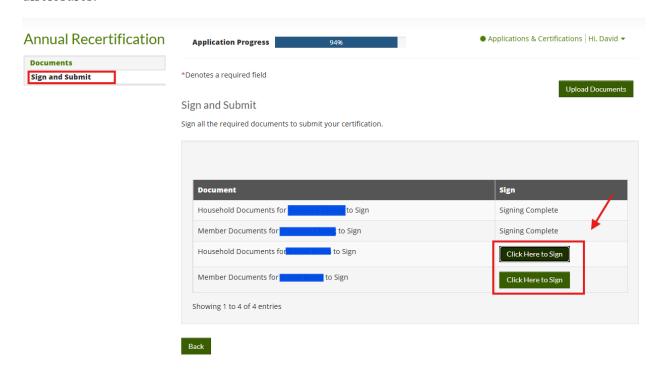
After Uploading Documents

7. Once all documents have been uploaded, the household member can view the files along with their upload dates. The household member should click **Next** to proceed to the **Sign and Submit** screen.

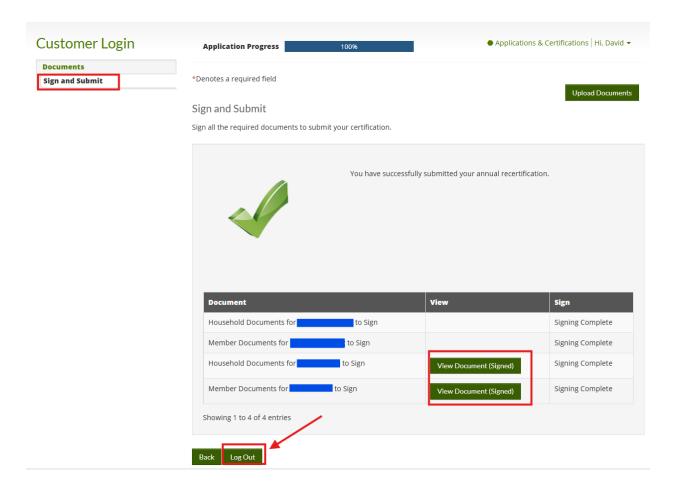


Other Member Signing Disclosures

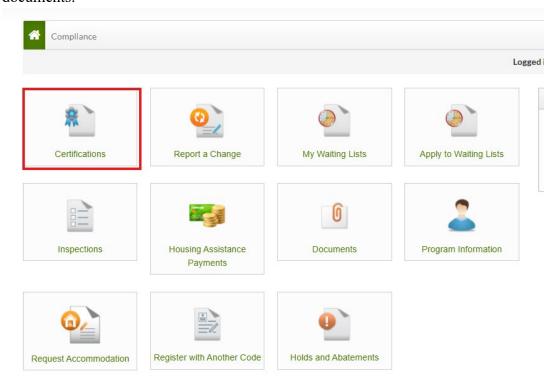
8. The household member will click **Click here to sign** to proceed with signing the disclosures.



9. The household member will complete the same disclosures as the HOH. After signing the documents, they can view the signed copies. When finished, the household member can click **Log Out** to exit the portal.



- 10. Once the other adult household member signs the verification, the HOH will receive an email notifying them that all invited members have completed signing the documents.
- 11. Once the Head of Household signs into RentCafe and clicks the **Certification** tile, their application and certification will show as **Pending**. This status means the application is awaiting review and processing by the agency. The resident can click **View** to check whether other adult household members have signed their documents.



Applications & Certifications



12. HOH is able to view status of signatures and can click Log out.

