



# **City of San Jose Rent Compliance Portal - User Instruction Manual**

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**V2.1**

Submitted by:

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## Document Change Control

### *Change History*

Version	Date	Changes	Author
1.0	06/27/2024	Initial draft	3Di Systems
1.1	07/09/2024	Incorporated feedback from CSJ staff review	3Di Systems
2.0	07/17/2024	Formatting edits	San Jose
2.1	07/31/2024	Add homepage	3Di Systems

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## 1. Introduction

This document covers all of the features included in City of San Jose Rent Compliance Portal and their respective instructions.

### 1.1 Links to Portal and Apps

#### 1.1.1 Production Version

Production Web Portal - <https://rentcompliance.san Joseca.gov/>

### 1.2 Terms Explained

#### 1.2.1 Borrower

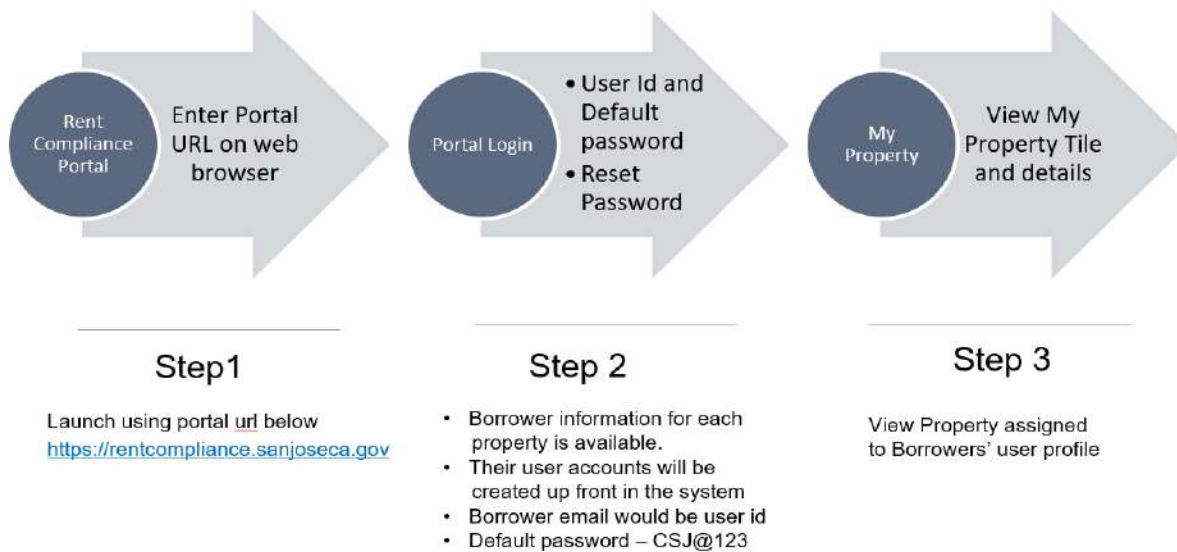
If you are a Borrower, you are responsible for property compliance, but may not deal directly with creating and uploading rent rolls. You will receive an invitation email explaining steps to login to the portal for each property you are responsible for (this will be a systematic email sent from [rent.compliance@san Joseca.gov](mailto:rent.compliance@san Joseca.gov)).

#### 1.2.2 Property Manager (also called compliance contact):

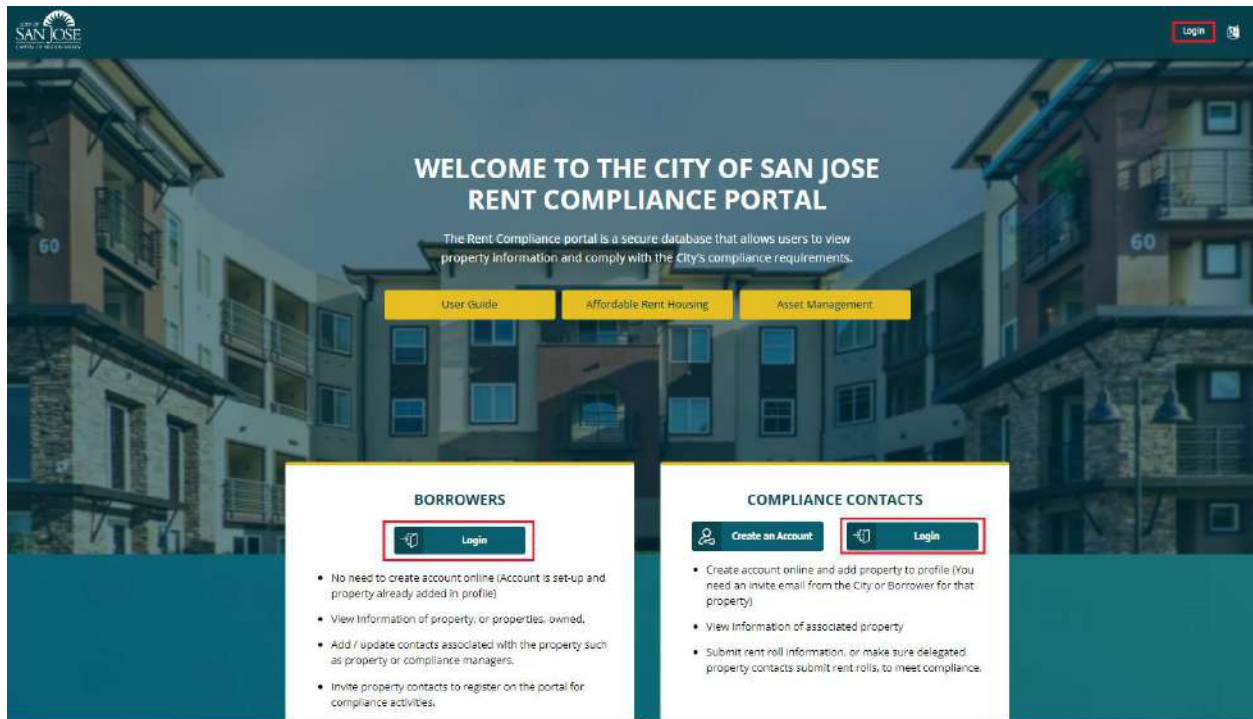
If you are a property manager you are the person responsible for creating and submitting rent rolls. If your email is already saved in the city's records for the property, you would also be receiving an invitation email for each property you oversee.

Note: If you were recently added to the property as either a borrower or property manager contact, the city may not have your email information to send an invitation email. In such cases, please email [rent.compliance@san Joseca.gov](mailto:rent.compliance@san Joseca.gov) or reach out to the City of San Jose Asset Management division. ([asset submissions@san Joseca.gov](mailto:asset submissions@san Joseca.gov))

## 2. Borrower or property Manager Login



- The City of San Jose already has information recorded for both Borrower and property manager emails from their original records including email addresses. Your email has already been created in the system with the associated property. In that case there is no need to create an account (or register) on the rent compliance portal.
- Instead you would simply login with the email and credentials in order to see the associated property information under the 'My Dashboard' webpage.
  - From the Homepage, click on the "Login" button.



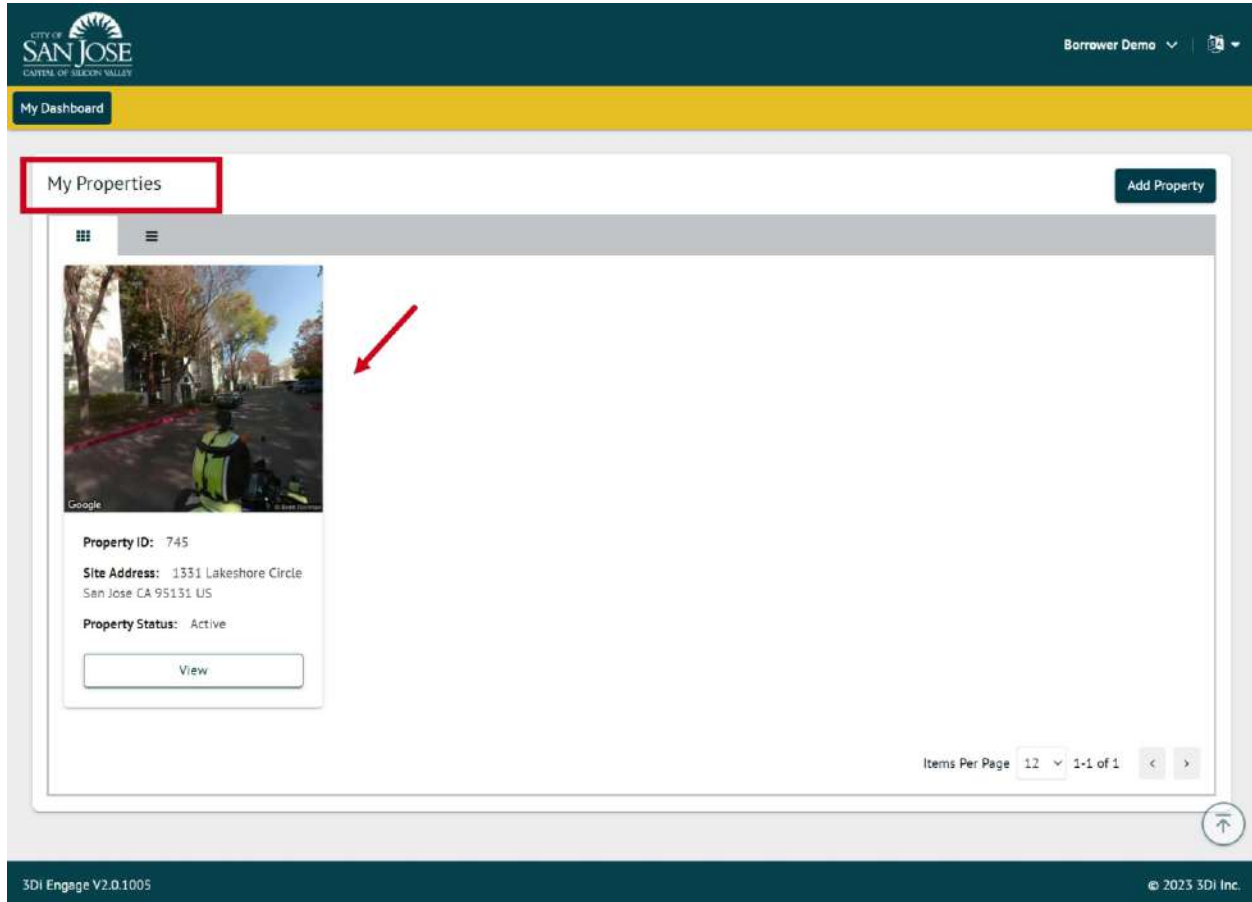
- On the Login page, enter in your “Username” (email address) and “Password,” then click on the “Login” button.



Enter Username and  
Password to Login

## 2.1 Login/Access to Dashboard

- Once you have logged in the user will be able to see the “My Dashboard” webpage” and the properties they are associated with.



## 2.2 View Property

- Select view option on each of the selected properties to view property details.

The screenshot displays the City of San Jose Rent Compliance Portal. The header includes the City of San Jose logo and the text "CITY OF SAN JOSE CAPITAL OF SILICON VALLEY". The user is logged in as "Borrower Demo". The "My Dashboard" tab is selected. The "My Properties" section is active, showing a list of properties. The first property is highlighted with a red box. The property details are as follows:

- Property ID: 745
- Site Address: 1331 Lakeshore Circle  
San Jose CA 95131 US
- Property Status: Active

A red box highlights the "View" button, and a red arrow points to it. The "Add Property" button is visible in the top right corner. The footer shows "3Di Engage V2.0.1005" and "© 2023 3Di Inc."



## 2.3 View Property Details

Upon selecting the view button on a property you will be redirected to the property details webpage.

**Overview**  
 Property ID: 745 | Total Unit Count: 12 | Property Name: Willow Lake | Lead Developer: Soriano Development Company | Council District: 3  
 Property Status: Rent Roll In progress

**Address**  
 1331 Lakeshore Circle San Jose CA 95131 US

**Affordability Requirement**  

Occupancy Assumption	Affordability Requirement	Affordability Level	First Restricted	No. Of Units	Bedroom	Income Level
HCD	Inclusionary AR	3.20%	Yes	7	unallocated	Moderate
PHCD	Inclusionary AR	3.0%	Yes	5	unallocated	Very Low

 1-3 of 3 items

**Utility Allowance**  

Utility Schedule Type	Utility	Number Of Units	Amount
COOKING	ELECTRIC	Not available	Not available
HEATING	HEATING	Not available	Not available
SEWER	SEWER ELECTRIC/SEWERING	Not available	Not available
WATER	WATER	Not available	Not available
WATER HEATING	NATURAL GAS	Not available	Not available

 1-5 of 5 items

**Unit Information**  

Unit Number	Bedroom	Square Footage
48-1-150	2	1150
49-1-174	2	1150
51-1-227	2	1150
53-1-253	2	1150
52-1-200	2	1150
40-1-100	2	1150
51-1-218	2	1150
54-1-235	2	1150
49-1-182	2	1150
40-1-158	1	650

 1-10 of 12 items

**Rent Roll Submission**  

Unit	Case Status	Fund Source (PHD or Fee Credit)	Occupant Type	HOME UNIT	CSI Aff Level	Lease Start Date	Lease Expiration Date	Household Size	HCD Rent	Amount Over Rent Limit	Is Amount Over Rent Limit	Action
No Record Found												

 No items to display

**Contacts**  

Associated to property as	Contact Type	Name	Address	Phone Number	Email	Contact ID
Borrower	Individual	Maten Borrower	2347 Cunningham Court Farmington Hills San Jose CA 48535 US	(526) 539-4565	maten.borrower@3diamed.com	
Property Manager	Individual	Barbara Valencia		(408) 455-7273	bvalencia@3diamed.com	
Architect	Individual	Borrower (Jen)		(455) 455-4554	borrower2@3diamed.com	

 1-3 of 3 items

**Notes**  
 No Record Found

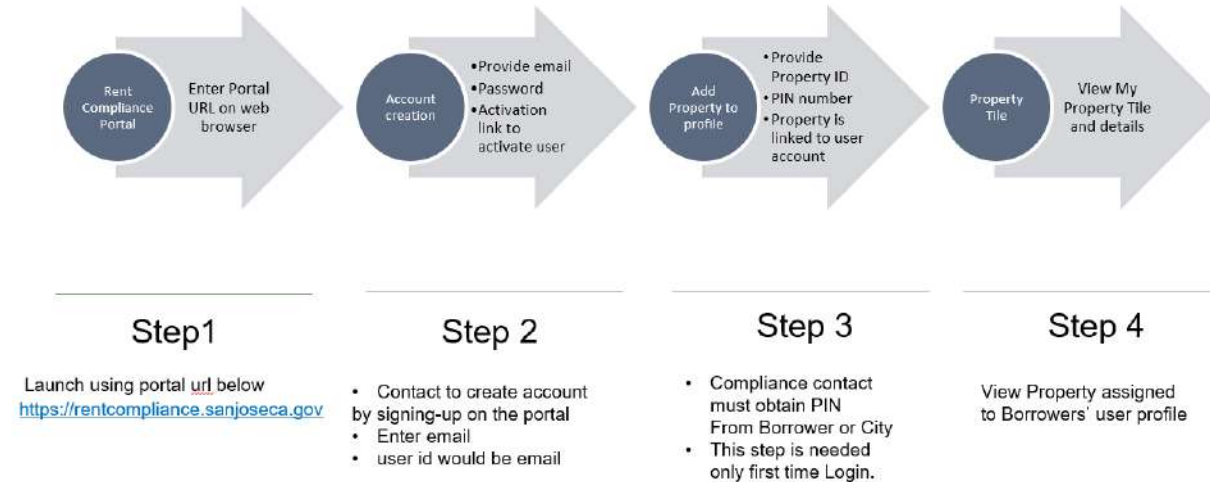
**Change Log**  

Date	Time	Action
10/25/2023	1:27:04 PM	Associate Contact
07/25/2023	11:12 PM	Unit Rent Roll Submission case created
07/25/2023	11:10 PM	Unit Rent Roll Submission case created
07/25/2023	02:19 AM	Property Rent Roll case created
07/25/2023	12:47 PM	Associate Contact

3Di Engage V2.0.1003 | © 2023 3Di Inc.

### 3. Registration/Login as new Compliance Contact (e.g. Manager)

#### 3.1 Registration as Compliance Contact



**Note:** If you have already received an invitation email to login to rent compliance portal, you do not need to follow these steps. If that is not the case and you are new to the property, the City of San Jose may not have your email address. In such a scenario, you will need to first email [Rent.Compliance@sanjoseca.gov](mailto:Rent.Compliance@sanjoseca.gov) or reach out to the assigned borrower to get information on enrolling in the rent compliance portal. Once you receive instructions from your borrower or the City of San Jose please follow the steps below:

- Register as a Compliance Contact by clicking on the “Register” button as depicted below.
- Provide the requested information asked of you within the registration process.



LOGIN

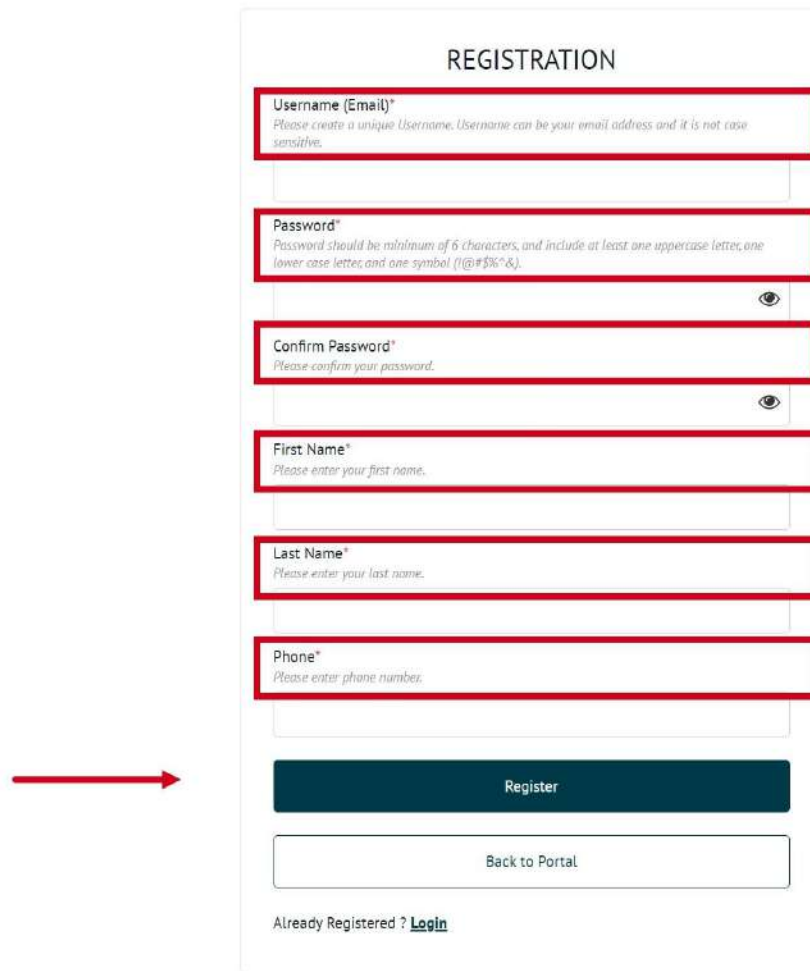
Username (Email)\*

Password\*

☐ Remember Me [Forgot Password?](#)

Login

Register



REGISTRATION

**Username (Email)\***  
*Please create a unique Username. Username can be your email address and it is not case sensitive.*

**Password\***  
*Password should be minimum of 6 characters, and include at least one uppercase letter, one lower case letter, and one symbol (!@#\$%^&.).*

**Confirm Password\***  
*Please confirm your password.*

**First Name\***  
*Please enter your first name.*

**Last Name\***  
*Please enter your last name.*

**Phone\***  
*Please enter phone number.*

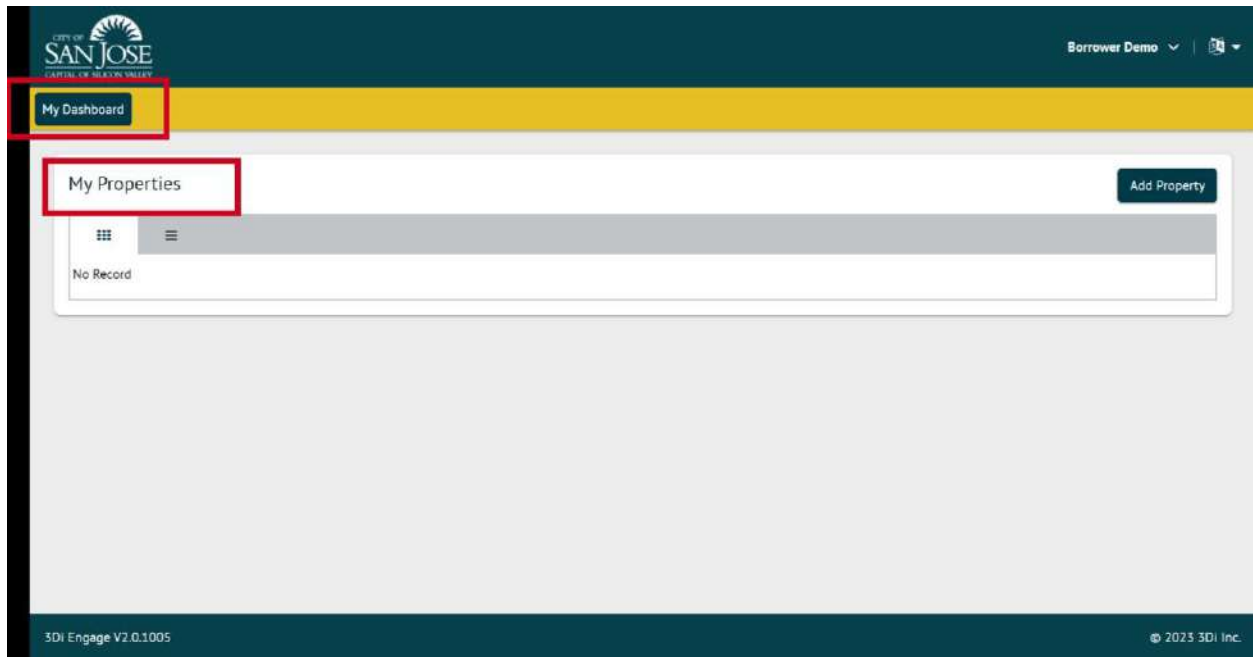
**Register**

**Back to Portal**

Already Registered ? [Login](#)

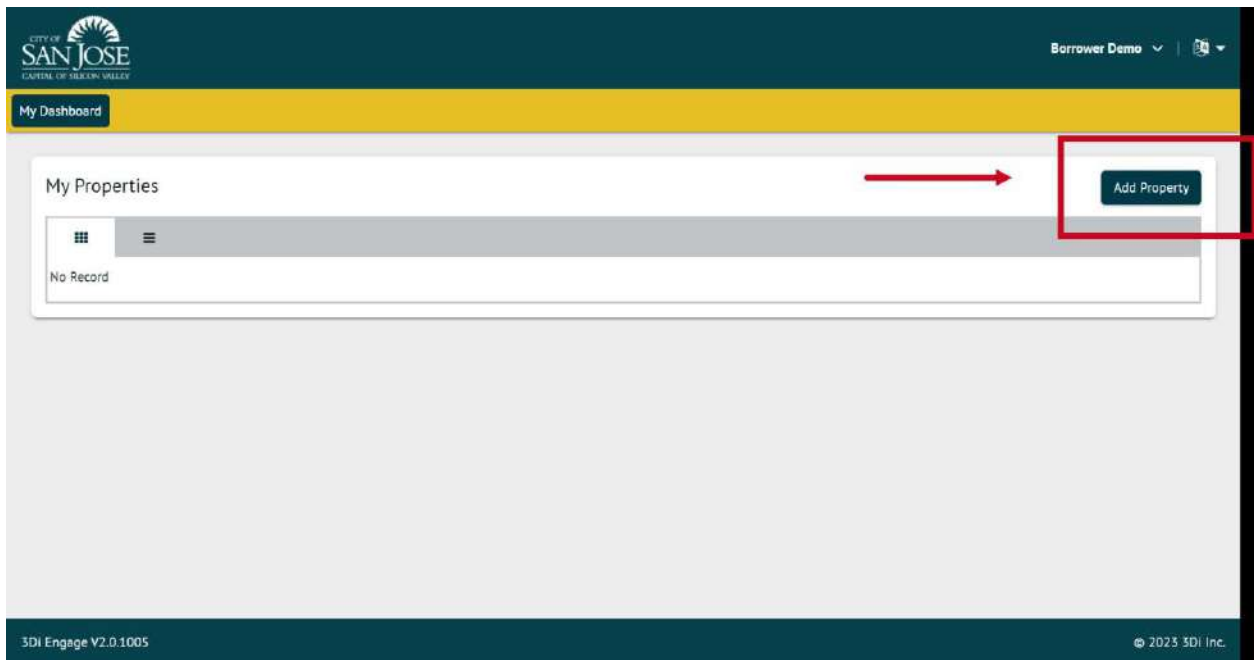
### 3.2 Compliance Contact Login

- Once you have provided the requested information and select the “Register” button, you will receive an email from [Rent.Compliance@sanjoseca.gov](mailto:Rent.Compliance@sanjoseca.gov) with an activation link. Once you click on the activation link and you successfully register, you will be redirected to the Log In webpage. At that point you may proceed with entering the email and password you provided during the registration process in order to login to the portal. Note: Depending on your email settings your email provider may filter some emails to your Spam Folder. Please make sure to check your Spam Folder if you do not see the activation email.
- Once a user has logged in you will be redirected to the “My Dashboard” webpage.



### 3.3 Add Property

- User will be able to add properties as a compliance contact by selecting the Add Property button.



### 3.4 Adding a Property as a Compliance Contact

- In order to add a property as a Compliance Contact you would select the Add Property button, a pop up will display where you need to enter the following information to add a property,
  - **Associated To Property As**
  - **Property ID**
  - **Pin.**
- Once all the required information has been entered click on the **Add button** in order to successfully add a property.

**Please Note:** You will need to email [Rent.compliance@sanjoseca.gov](mailto:Rent.compliance@sanjoseca.gov) to receive the above information.

**Add Property**

Associated to property as\*

Select

Property ID\*

Property ID

Pin\*

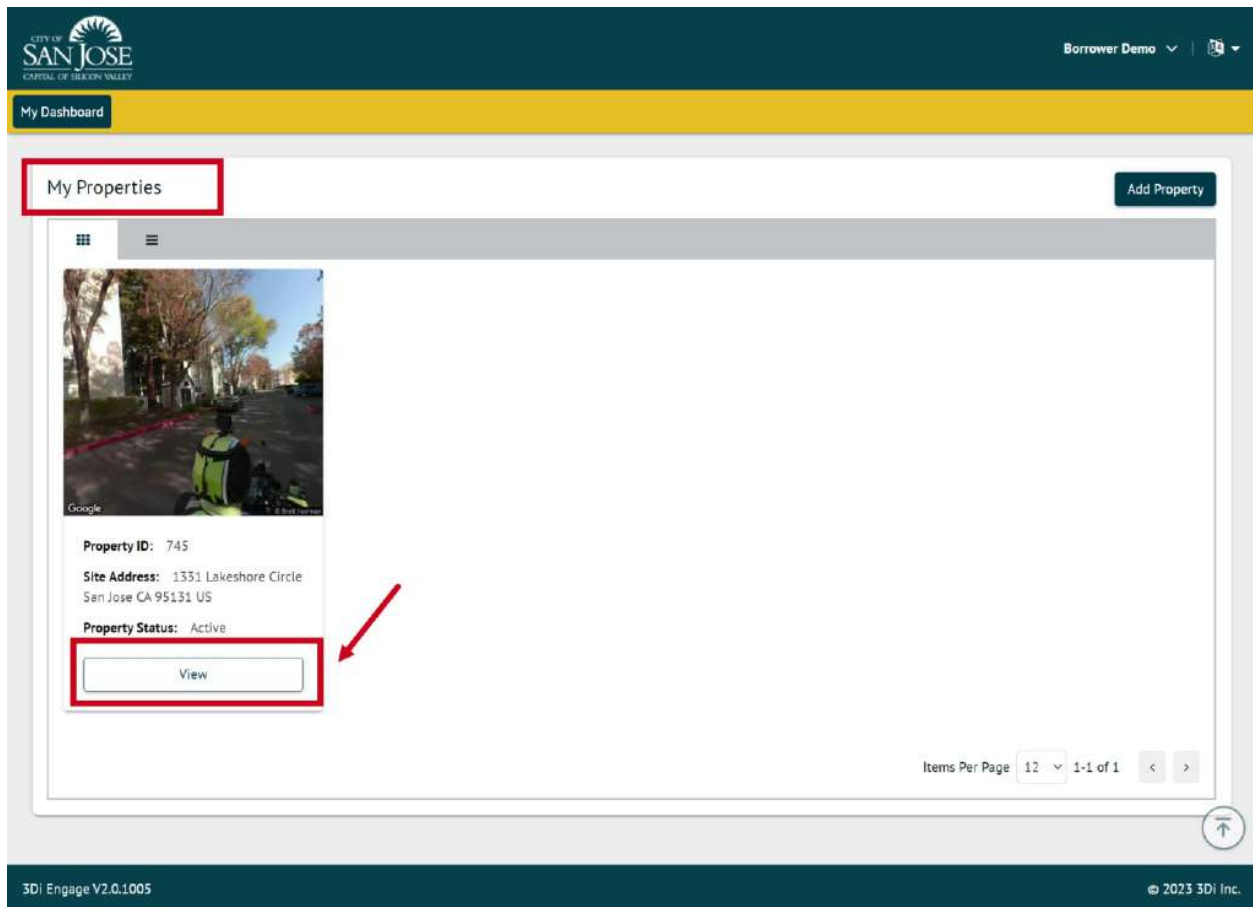
Enter Pin

Cancel Add

To Add a Property, a user must enter all required information.

### 3.5 View Property

- Once the property has been successfully added, you will see the added property under the “My Properties” tab.
- Select view option on property tile to view property details.



### **3.6 View Property Details**

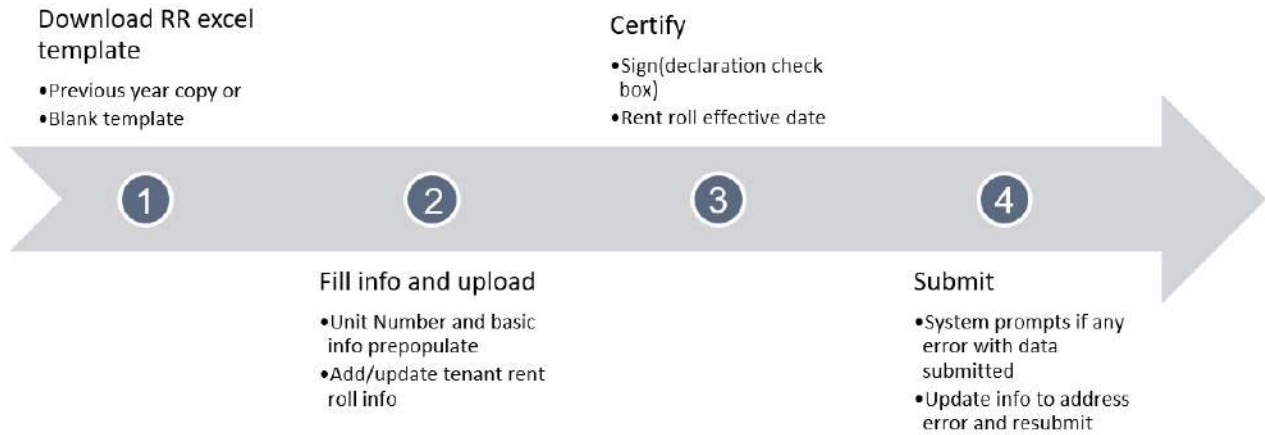
Once you select the view button within the property then you will be redirected to the property details page.





## 4. Submit Rent Roll

### 4.1 Submit Rent Roll– Compliance Contact & Borrower users



- User can click on the “Rent Roll Submission” button within the inventory details page and the user will be directed to the Rent Roll submission webpage.

Rent Roll Submission [Latest]

+ Rent Roll Submission

Unit	Case Status	Fund Source (HCD or Tax Credit)	HOME Unit	CSJ AMI Level	Lease Start Date	Lease Expiration Date	Lease Expiration Date Flag	Date Last Certified Flag

No Record Found

0 Items per page

No items to display

#### 4.2 Submit Rent Roll - Compliance Contact & Borrower User

- Users can submit a rent roll by uploading the Rent Roll submission template.
- The Rent Roll must be imported using the template provided on the portal.
  - Users can either download previous years submissions and edit it and resubmit for current year or alternatively they can
  - Download a new template and input information for each unit.
- User upon uploading the completed template must certify its accuracy by selecting the declaration checkbox as shown below.

Individual

Quang Nguyen

4085823125

nguyen@charitieshousing.org

Report Rent Roll Information

1. Download the Previous Year Submissions

Fee Year	File Name
2020	<a href="#">Rent_Roll_Submission_2020.xlsx</a>
2021	<a href="#">Rent_Roll_Submission_2021.xlsx</a>
2022	<a href="#">Rent_Roll_Submission_2022.xlsx</a>

2. Download the Excel worksheet template by clicking [here](#).

The template is only compatible with Microsoft Excel version 2013 or later, and should not be opened in Google Sheets or Numbers for Mac.

3. Follow the instructions included in the "Instructions" worksheet tab to complete the template in full. You must complete a separate worksheet for each parcel.

4. Upload the completed worksheet template by using the "Select file" button below.

Choose File\*

Select files...

You can only upload '.xlsx' files.

☐

\* 1. I am fully authorized to execute this certificate on behalf of the property owner, and I hereby certify that during the noted reporting period, this property was continually in compliance with the restrictions as set forth in the Affordability Restriction, and

2. The attached Rent Roll accurately reflects the project's occupancy information on said date; and

3. The Property Owner, or an entity acting on its behalf, has completed the full annual Tenant Income Certification for each unit and has received required documentation to support that certification, both at the resident's initial occupancy and on each anniversary of that occupancy; and

Signature

\* Type the name of the person signing this declaration. Do not provide the name of a business.

\* Date

6/27/2024

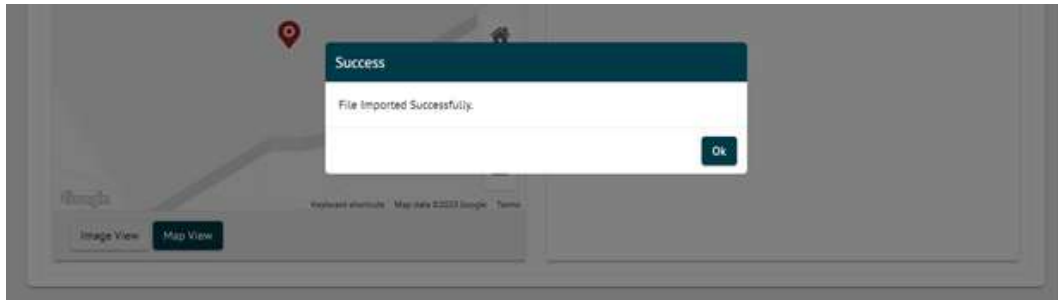
\* Rent roll effective on(as-of)

Submit

Cancel

#### 4.3 Rent Roll Submitted Successfully - Compliance Contact & Borrower User

- If the rent roll submission is successful a File Imported Successfully message will display.



#### 4.4 Rent Roll Submission Errors – Compliance Contact & Borrower User

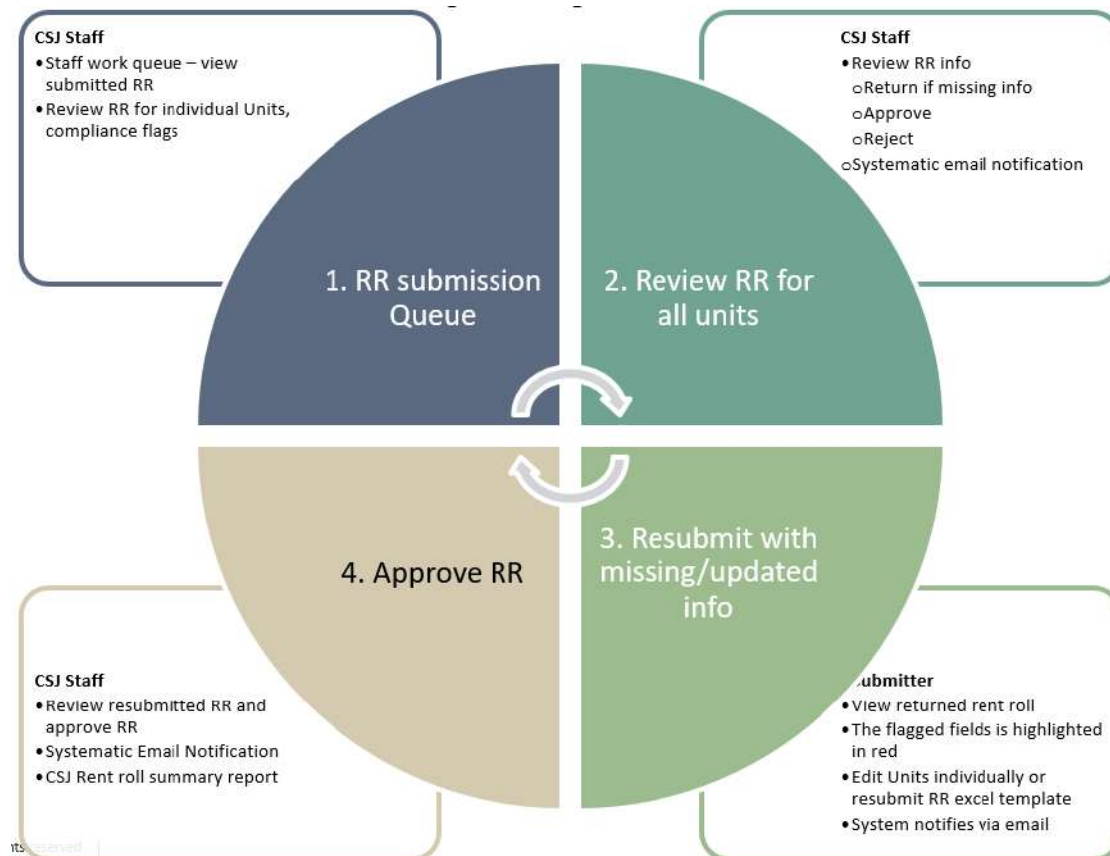
Below is the list of errors scenarios that will be displayed when submitting rent roll.

Error message: Certain information must be provided otherwise the system will display an error message.

Compliance Flag: System will allow submission but there may be other flagged violations or compliance review by the CSJ Staff.

Rent Roll Field	Data Rules	System error / Flag for CSJ review
<b>Missing Info or Total Units in Rent Roll do not match the total units of the property</b>	All required fields in rent roll should not be left blank or total units should match	System Error. Needs to be corrected to successfully submit Rent Roll.
<b>CSJ AMI Level</b>	Total number of units with AMI levels must be within the limit set under affordability restrictions. If a property has an affordability restriction of 60% AMI level for 10 units then the Rent Roll submission will have no more than 10 units with 60% AMI level	System Error. Needs to be corrected to successfully submit Rent Roll.
<b>Lease Start Date</b>	Must not be greater than Rent Roll as of date.	Flagged for compliance review by CSJ (no upfront system error)
<b>Lease Expiration Date</b>	Should not be less than 1 year from lease start date.	Flagged for compliance review by CSJ (no upfront system error)
<b>Date income was certified at move-in</b>	Cannot be 60 days more than lease start date.	Flagged for compliance review by CSJ (no upfront system error)
<b>Household Percent of AMI at move-in</b>	Must not be greater than CSJ AMI	Flagged for compliance review by CSJ (no upfront system error)
<b>Date Last Certified</b>	Must be less than 1 year from rent roll as of date.	Flagged for compliance review by CSJ (no upfront system error)
<b>Rent Limit</b>	Must be within guideline set for current year.	Flagged for compliance review by CSJ (no upfront system error)
<b>Rent Limit</b>	Must be within guideline set for current year.	Flagged for compliance review by CSJ (no upfront system error)

#### 4.5 Rent Roll Review by city and submitting corrections



CSJ Staff upon review may reject the Rent Roll for corrections for rent compliance. The Rent Roll submitter will receive a system generated email notifying rejection “Pending of the rent roll.

The units that require correction will have flags indicated in red color in the Rent Roll section of the property details page. User can login to the Rent compliance portal in order to view the information by clicking on the property in their profile.

Rent Roll Submission [Latest]

<div> <div></div> <div>Search...</div> <div></div> </div>									
Unit	Case Status	Fund Source (HCD or Tax Credit)	Occupant Type	HOME Unit	CSI AMI Level	Household Percentage of AMI flag	Rent roll effective on/as-of	View CSI Comments	Action
8	Pending Review	HCD	Vacant	0 - No	40%	No	6/18/2024		<div> <div></div> <div>Edit</div> <div></div> </div>
4	Pending Review	HCD	Vacant	0 - No	35%	No	6/18/2024		<div> <div></div> <div></div> <div></div> </div>
2	Pending Review	HCD	Vacant	1 - Low	50%	No	6/18/2024		<div> <div></div> <div></div> <div></div> </div>
1	Pending Review	HCD	Head of Household	0 - No	20%	No	6/18/2024		<div> <div></div> <div></div> <div></div> </div>

Edit

* Unit 100	* Number of Bedrooms 1
* Square Footage 600	* Fund Source (HCD or Tax Credit) HCD
* Occupant Type Head of Household	* Tenant Head of Household Home 100
* Home Unit No	* CSJ AMI Level 25%
* CSJ TIP Unit Yes	* Rent Subsidy \$ 1234.00
* Tenant Paid Rent \$ 111.00	* Lease Start Date 01/01/2023
* Lease Expiration Date 02/01/2024	* Prior Residence City San Jose
* Employment City San Jose	* HH Size at Move-In 2
* Annual Income at Move-In \$ 1224.00	* Date Certified at Move-In 02/01/2023
* Household Percent of AMI at Move-In 1%	* Household Size 1
* Annual Income \$ 111.00	* Date Last Certified 01/01/2021
* Head of Household Race White	* Head of Household Ethnicity Hispanic
* Head of Household Disability Status Yes	* Head of Household Date of Birth 01/01/1980
* Number of Tenants 55 and Older 1	* Number of Tenants Under 18 1
* Utility Allowance \$ 205.00	* HCD Rent \$ 789
* Amount Over Rent Limit \$ (-473.00)	

Cancel
Submit

Once the information is corrected on the unit Rent Roll (as displayed above), user will be prompted to select the certify check box before resubmitting the information.