



City of San Jose Rent Compliance Portal - User Instruction Manual

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V2.1

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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.sanjoseca.gov/>

1.2 Terms Explained

1.2.1 Borrower

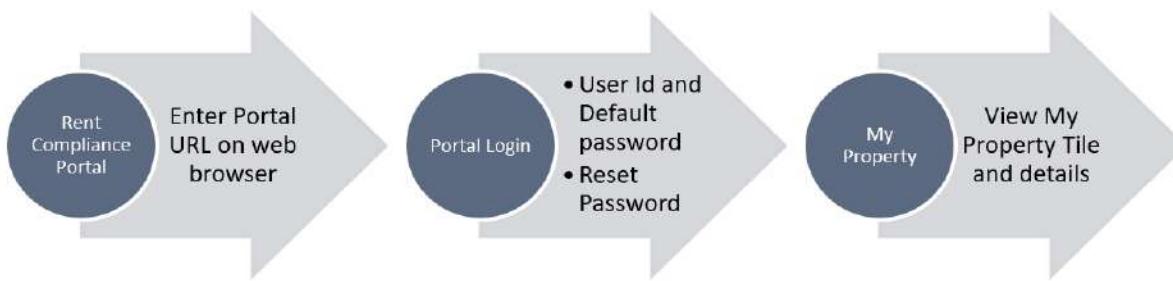
If you are a Borrower, you are responsible for property compliance, but may not deal directly with creating and uploading rent rolls. You will receive an invitation email explaining steps to login to the portal for each property you are responsible for (this will be a systematic email sent from rent.compliance@sanjoseca.gov).

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@sanjoseca.gov or reach out to the City of San Jose Asset Management division. (assetsubmissions@sanjoseca.gov)

2. Borrower or property Manager Login



Step 1

Launch using portal url below
<https://rentcompliance.sanjoseca.gov>

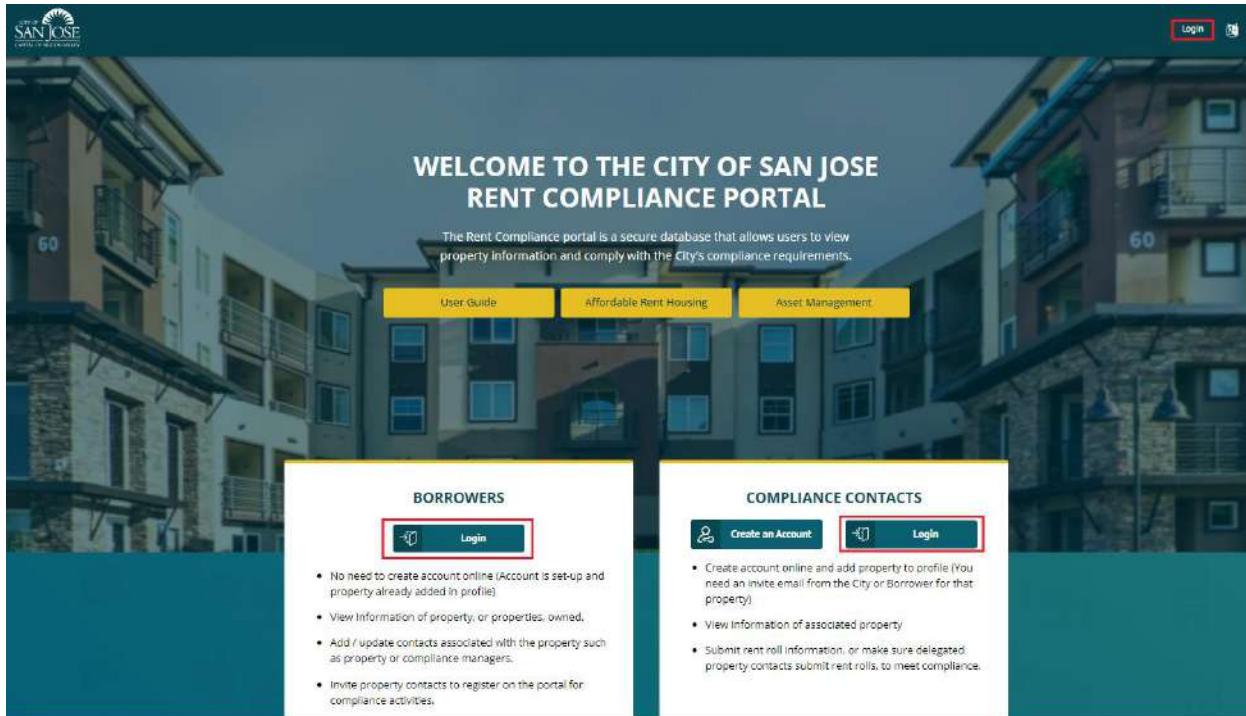
Step 2

- Borrower information for each property is available.
- Their user accounts will be created up front in the system
- Borrower email would be user id
- Default password – CSJ@123

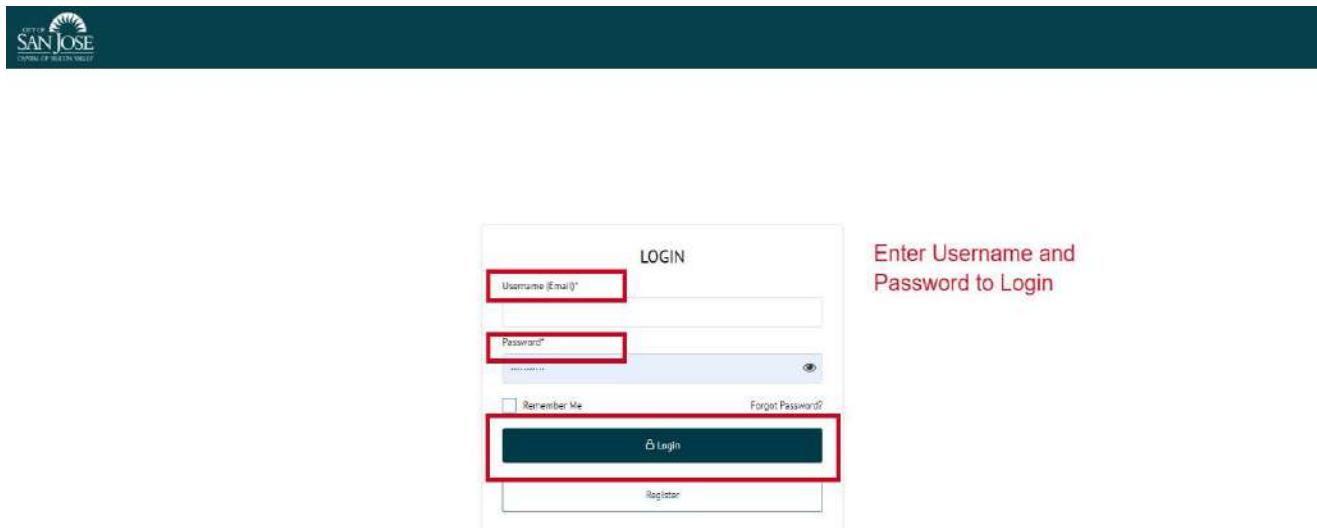
Step 3

View Property assigned to Borrowers' user profile

- 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.

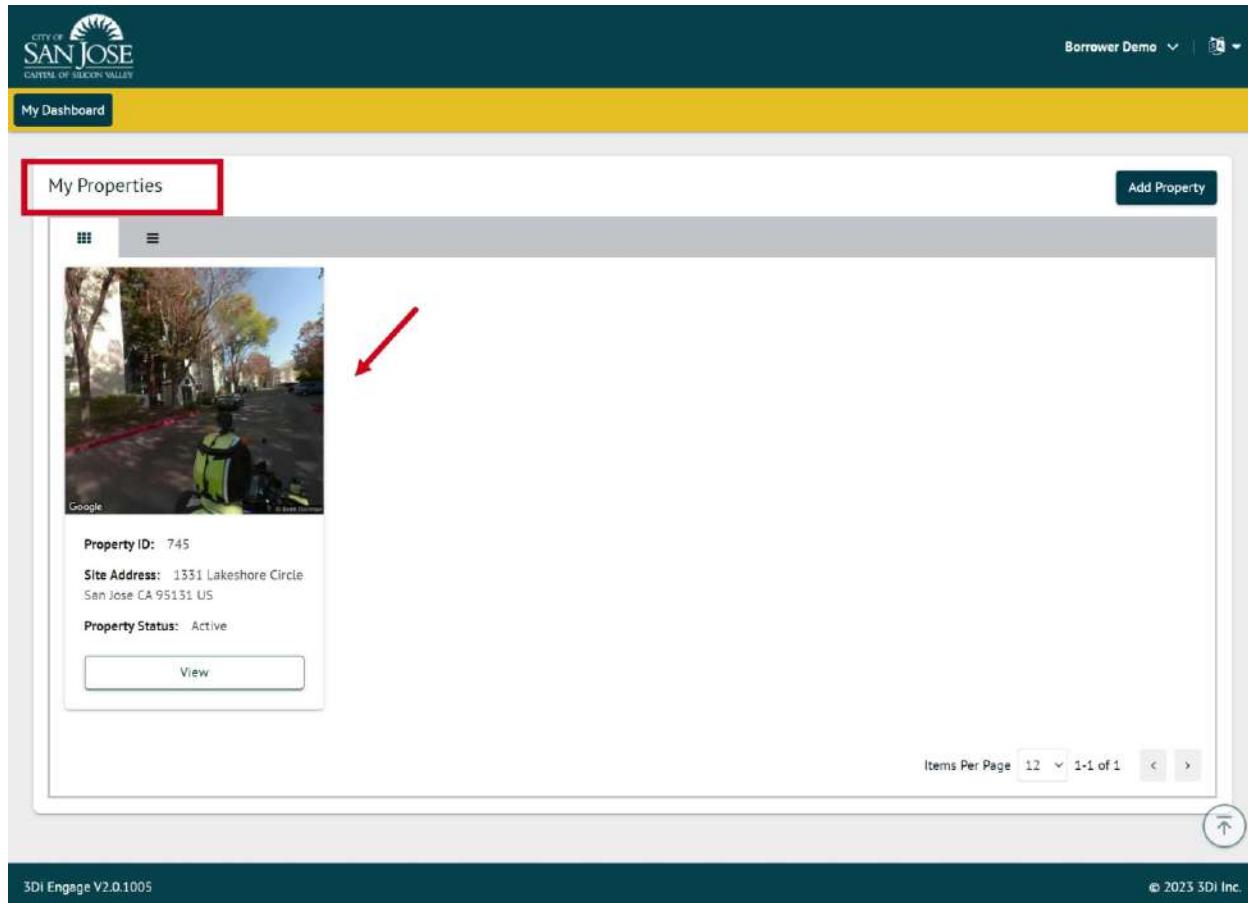


- On the Login page, enter in your “Username” (email address) and “Password,” then click on the “Login” button.



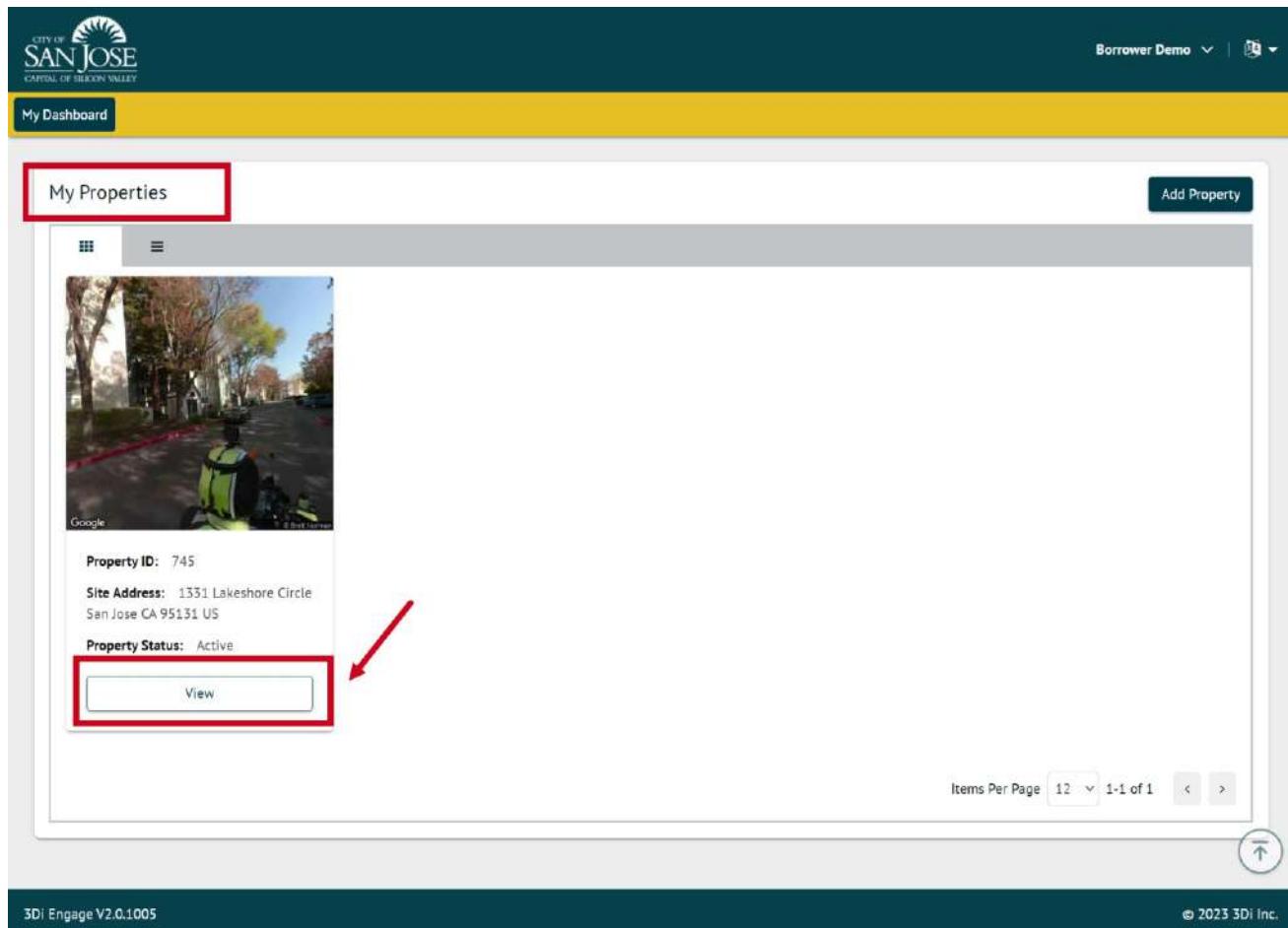
2.1 Login/Access to Dashboard

- 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.



My Properties

Property ID: 745

Site Address: 1331 Lakeshore Circle
San Jose CA 95131 US

Property Status: Active

View

Borrower Demo | 

My Dashboard Add Property

Items Per Page 12 1-1 of 1 < > 

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2.3 View Property Details

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

The screenshot displays the San Jose Rent Compliance Portal interface for the property "Willow Lake".

Overview: Property ID: 745, Total Unit Count: 12, Property Name: Willow Lake, Lead Developer: Sobrito Development Company, Council District: 3.

Address: 1321 Lakeshore Circle San Jose CA 95131 US.

Affordability Requirement:

Occupancy Assumption	Affordability Requirements	AHO Level	Mass Restricted	No Of Units	Bedrooms	Income Level
HCO	Inclusionary AH	3.20%	Yes	2	unrestricted	Moderate
HCO	Inclusionary AH	3.07%	No	2	unrestricted	Very Low

Utility Allowance:

Utility Schedule Type	Utility	Number Of Units	Amount
Cooking	Electric	100% available	Max available
Heating	Electric	Not available	Max available
Other	Other electric/heating	100% available	Max available
Water	Water	Not available	Max available
Water Heating	Electric spa	100% available	Max available

Unit Information:

Unit Number	Bedrooms	Square Footage
48-1550	2	1150
49-1574	2	1150
51-1277	2	1150
52-1512	2	1150
52-1500	2	1150
40-1400	2	1150
41-1355	2	1150
44-1325	2	1150
49-1480	2	1150
40-1488	1	600

Rent Roll Submission: No Record Found. No Items to display.

Contacts:

Associated to property as	Contact Type	Name	Address	Phone Number	Email	Comments	Contact #
Borrower	Individual	Helen Borrower	2347 Sunnyside Court San Jose CA 95135 US	(520) 559-4565	helen.borrower@3diemail.com		
Property Manager	Individual	Barbara Valente		(408) 455-7222	barbara@3diemail.com		
Architect	Individual	Borrower Demo		(455) 455-4554	borrower24@3diemail.com		

Notes: No Record Found.

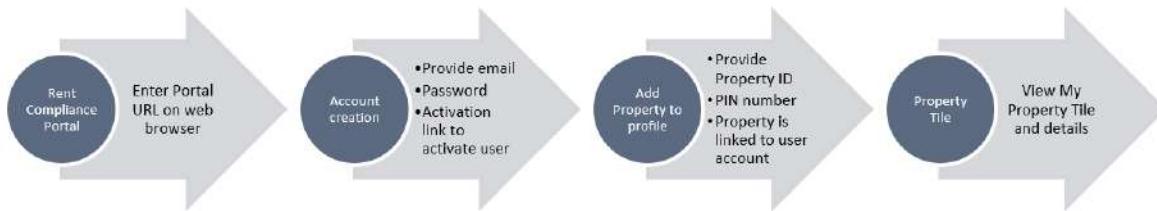
Change Log:

- 07/15/2023 12:28 PM | Associate Contact: Borrower Demo
- 07/15/2023 11:49 PM | UNIT RENT ROLL SUBMISSION CASE CREATED: BORROWER DEMO
- 07/15/2023 11:49 PM | UNIT RENT ROLL SUBMISSION CASE CREATED: BORROWER DEMO
- 07/15/2023 07:10 PM | Property Rent Roll case created
- 07/17/2023 12:48 AM | Associate Contact: Helen Borrower

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

3.1 Registration as Compliance Contact



Step 1

Launch using portal [url](https://rentcompliance.sanjoseca.gov) below
<https://rentcompliance.sanjoseca.gov>

Step 2

- Contact to create account by signing-up on the portal
- Enter email
- user id would be email

Step 3

- Compliance contact must obtain PIN From Borrower or City
- This step is needed only first time Login.

Step 4

View Property assigned to Borrowers' user profile

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 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

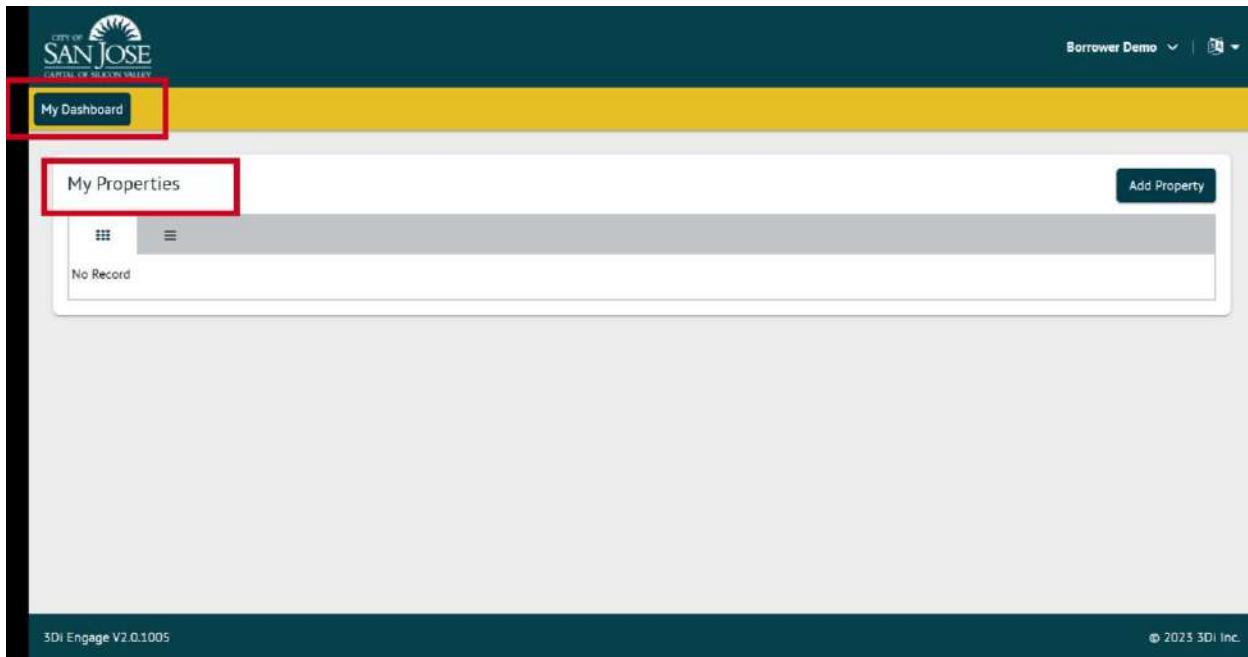
Back to Portal

Already Registered ? [Login](#)



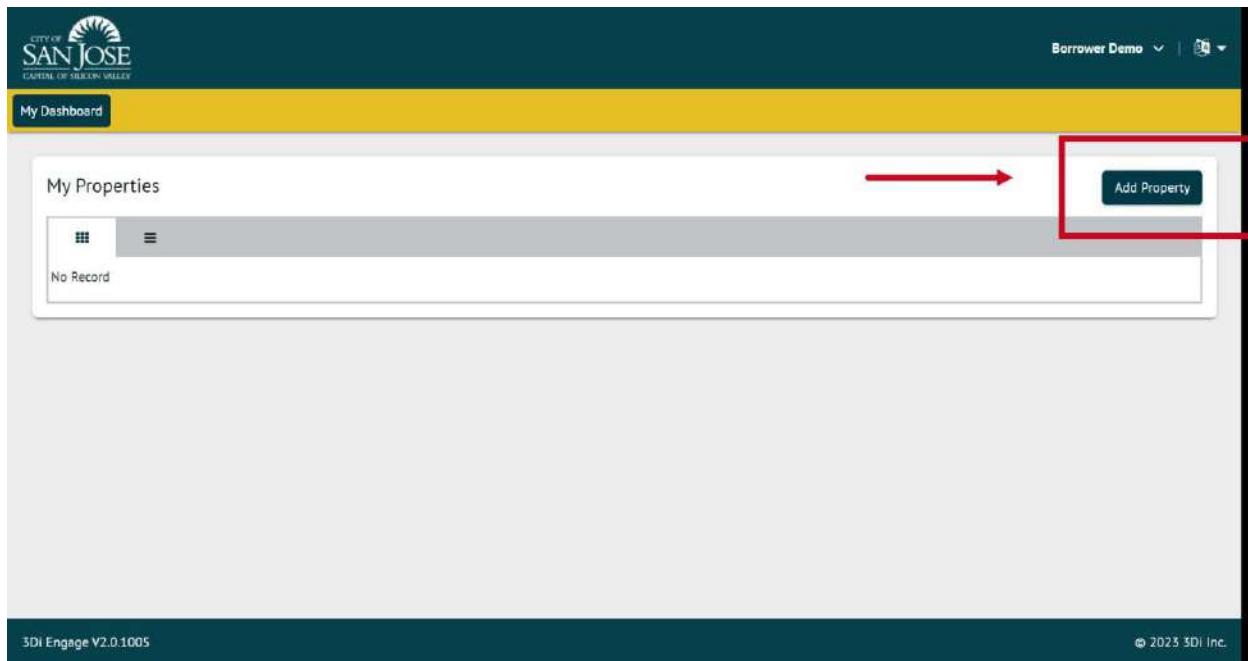
3.2 Compliance Contact Login

- Once you have provided the requested information and select the “Register” button, you will receive an email from Rent.Compliance@sanjoseca.gov 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

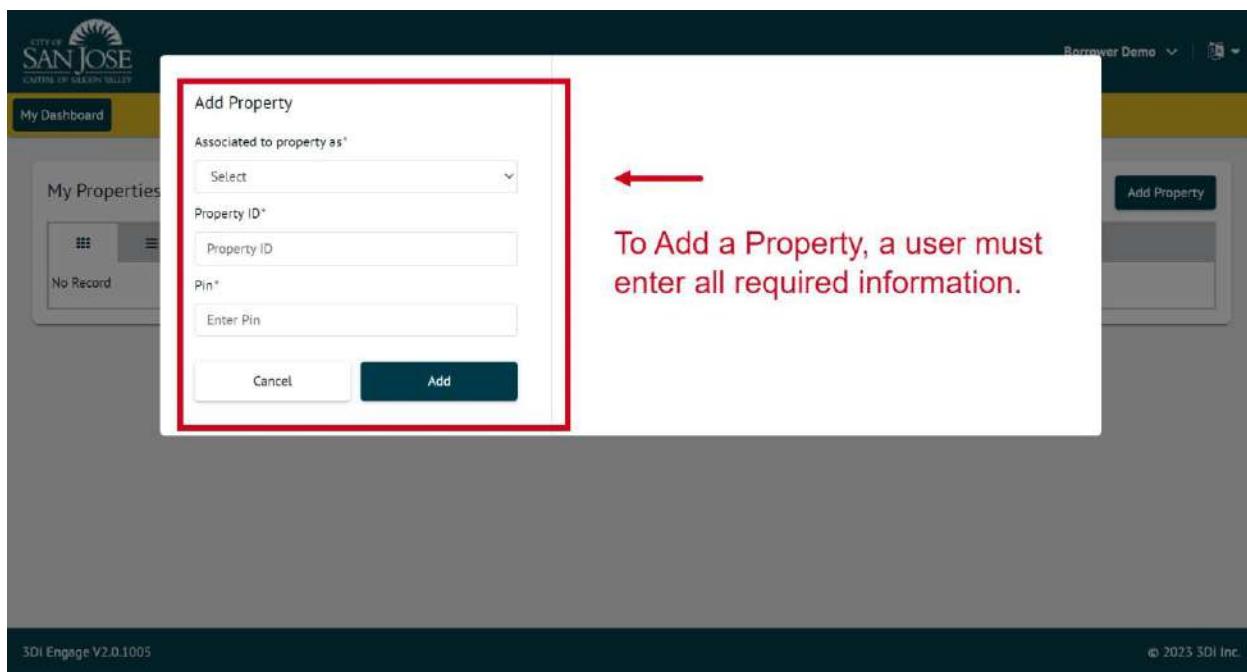
- User will be able to add properties as a compliance contact by selecting the Add Property button.



3.4 Adding a Property as a Compliance Contact

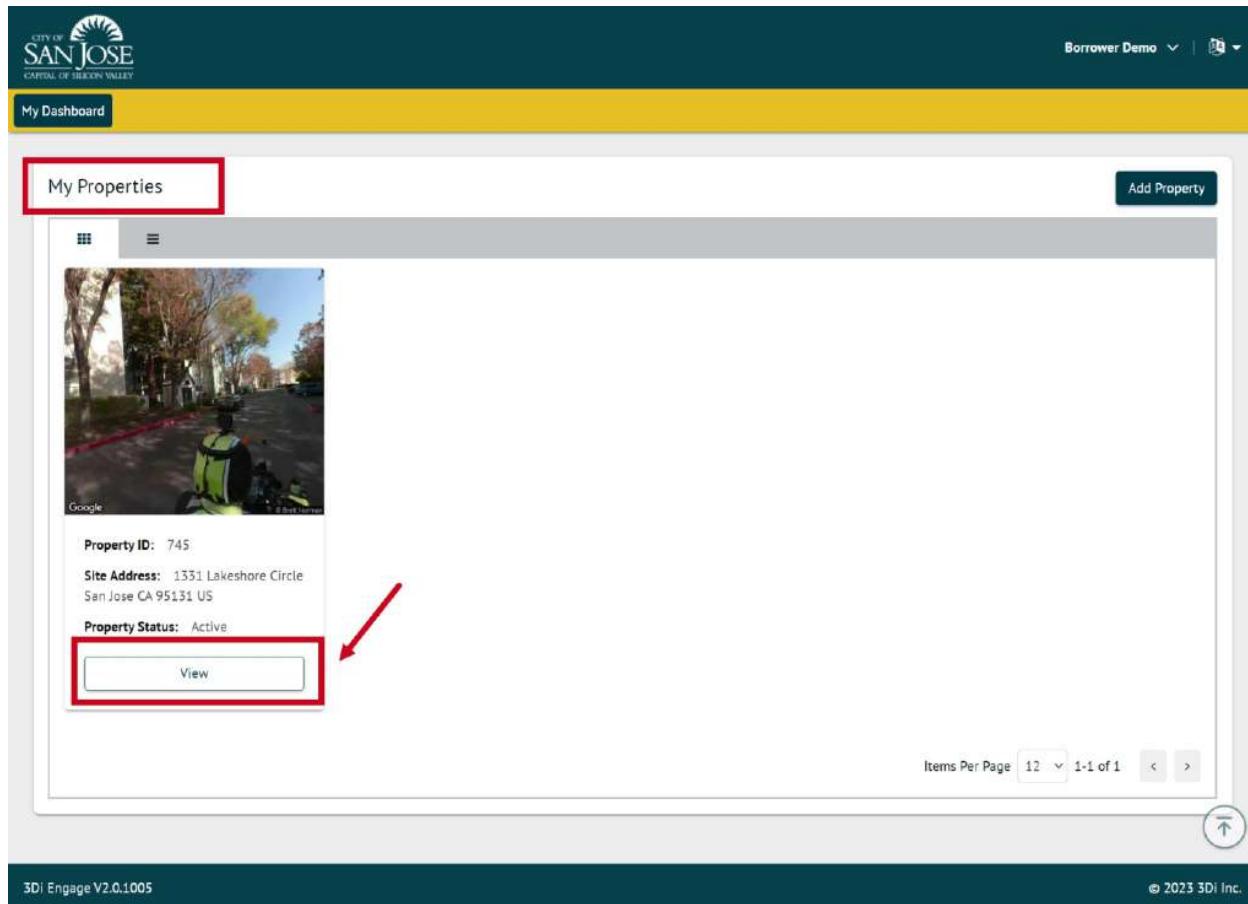
- In order to add a property as a Compliance Contact you would select the Add Property button, a pop up will display where you need to enter the following information to add a property,
 - **Associated To Property As**
 - **Property ID**
 - **Pin.**
- Once all the required information has been entered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

Please Note: You will need to email Rent.compliance@sanjoseca.gov to receive the above 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.



My Properties

Property ID: 745

Site Address: 1331 Lakeshore Circle
San Jose CA 95131 US

Property Status: Active

View

Items Per Page: 12 | 1-1 of 1

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3.6 View Property Details

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

San Jose
City of San Jose

My Dashboard

Overview
Property ID : 740 | Total Unit Count : 12 | Property Name : Willow Lake | LAND DEVELOPER : Sodexo Development Company | COUNCIL DISTRICT : 2 | Back

Address
Address: 1335 Lakeshore Circle San Jose CA 95131 US
Image View | Map View

Affordability Requirement
Columns: Occupancy Assumption, Affordability Requirement, AMI Level, Max Restricted, No. Of Units, Bedroom, Income Level
HED: Inclusionary AMI: 320% Yes 7 unattached Moderate
FMD: Inclusionary AMI: 30% Yes 3 unattached Very Low
Export to Excel | Search | 1-2 of 2 items

Utility Allowance
Columns: Utility Schedule Type, Utility, Number Of Units, Amount
Cooking: Natural Gas: NOT AVAILABLE: Not available
Heating: Electric: NOT AVAILABLE: Not available
Other: Other electric/lighting: NOT AVAILABLE: Not available
Water: Water: NOT AVAILABLE: Not available
Water Heating: Natural Gas: NOT AVAILABLE: Not available
Export to Excel | Search | 1-5 of 5 items

Unit Information
Columns: Unit Number, Bedroom, Square Footage
46-1550: 2: 1150
46-1574: 2: 1150
51-177: 2: 1150
52-1513: 2: 1150
53-1100: 2: 1150
45-1490: 2: 1150
53-1213: 2: 1150
61-1225: 2: 1150
46-1482: 2: 1150
46-1480: 1: 0.00
Export to Excel | Search | 1-10 of 12 items

Rent Roll Submission
Columns: Unit, Case Status, Rent Source (HCD on Tax Credit), Occupant Type, HOME Unit, CSI AMI Level, Lease Start Date, Lease Expiration Date, Household Size, HCD Rent, Amount Over Rent, % Amount Over Rent Limit, Action
No Record Found
Export to Excel | Search | No items to display

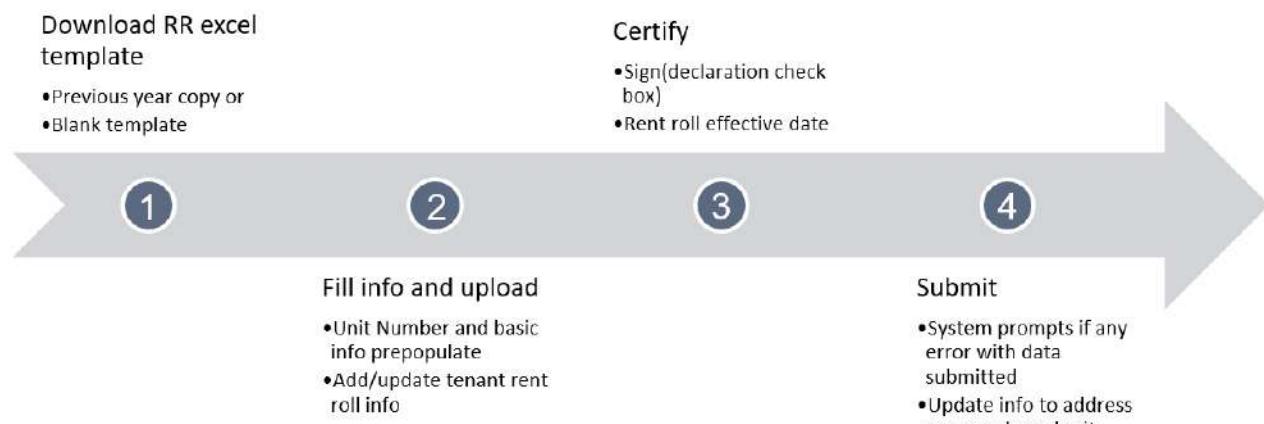
Contacts
Associated to property as: Contact Type: Name: Address: Phone Number: Email: Social ID: Contact R
Borrower: Individual: Helen Borrower: 2347 Cunningham Court Farmington Hills San Jose CA 95131 US: (408) 539-4565: helen.borrower@3dilemco.com
Project Manager: Individual: Barbara Vazquez: (408) 455-7722: barbara.vazquez@3dilemco.com
Architect: Individual: Borrower (Demo): (408) 455-4554: borrowerdemo@3dilemco.com
Export to Excel | Search | 1-3 of 3 items

Notes
No Record Found

Change Log
10/19/2022 3:02:48 PM: Associate Contact: Borrower Demo
09/12/2022 11:15:49 PM: UNIT Rent Roll Submission case created: Bkfst Admin
09/12/2022 11:10:06 PM: Unit Rent Roll Submission case created: Bkfst Admin
09/12/2022 07:19:49 PM: Property Rent Roll case created: Helen Borrower
09/12/2022 12:49:49 PM: Associate Contact: Helen Borrower
2022 3Di Inc.

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]

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

Items per page: 5

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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 | quanguyen@charitieshousing.org X

Report Rent Roll Information

1. Download the Previous Year Submissions

Fee Year	File Name
2020	Rent_Roll_Submission_2020.xlsx
2021	Rent_Roll_Submission_2021.xlsx
2022	Rent_Roll_Submission_2022.xlsx

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.

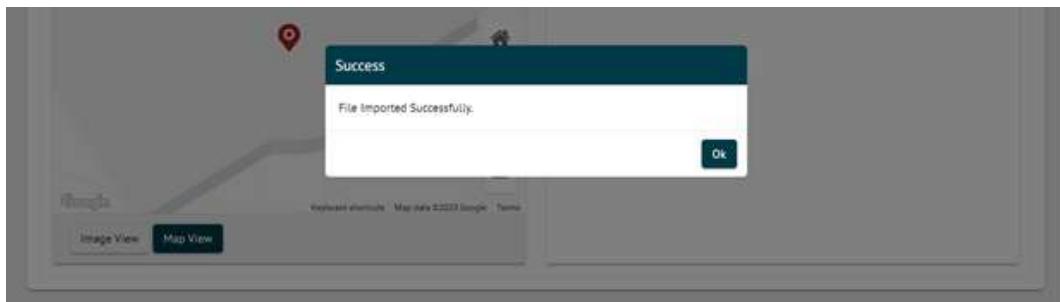
* Date * Rent roll effective on(as-of)

Select Date

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.



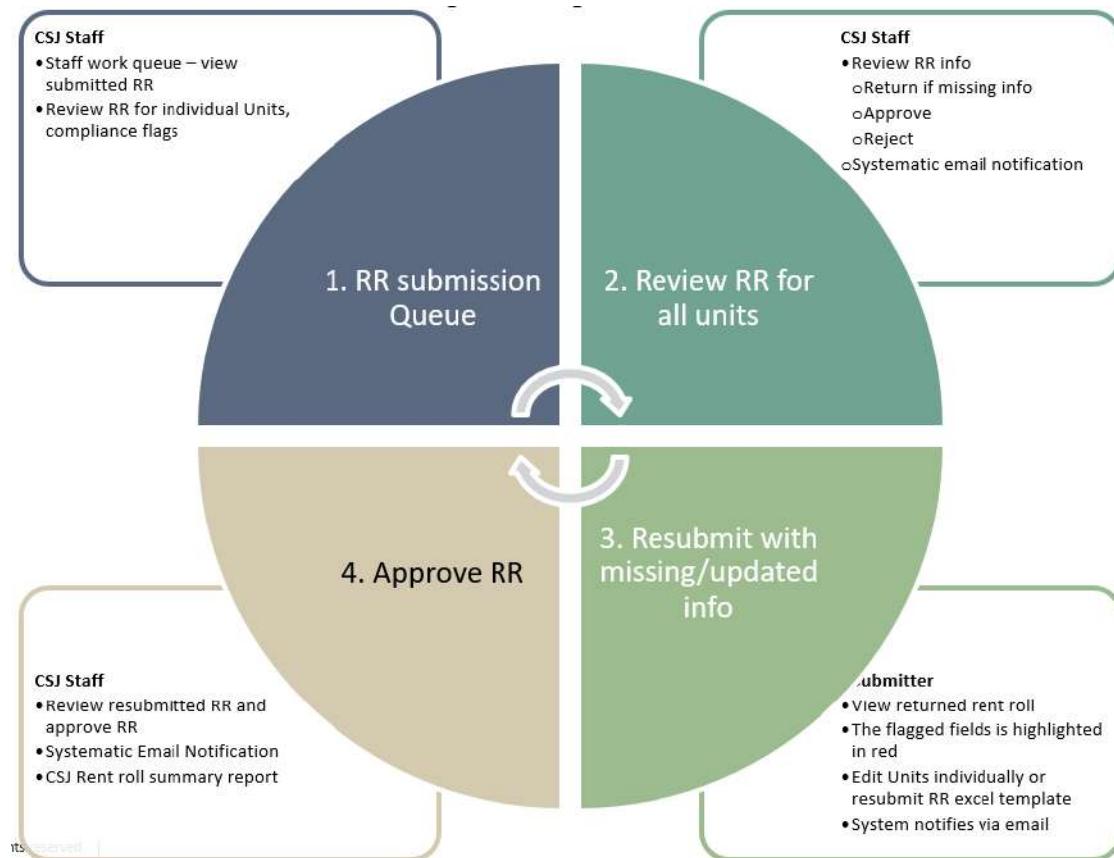
4.4 Rent Roll Submission Errors – Compliance Contact & Borrower User

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
Missing Info or Total Units in Rent Roll do not match the total units of the property	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.
CSJ AMI Level	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.
Lease Start Date	Must not be greater than Rent Roll as of date.	Flagged for compliance review by CSJ (no upfront system error)
Lease Expiration Date	Should not be less than 1 year from lease start date.	Flagged for compliance review by CSJ (no upfront system error)
Date income was certified at move-in	Cannot be 60 days more than lease start date.	Flagged for compliance review by CSJ (no upfront system error)
Household Percent of AMI at move-in	Must not be greater than CSJ AMI	Flagged for compliance review by CSJ (no upfront system error)
Date Last Certified	Must be less than 1 year from rent roll as of date.	Flagged for compliance review by CSJ (no upfront system error)
Rent Limit	Must be within guideline set for current year.	Flagged for compliance review by CSJ (no upfront system error)
Rent Limit	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]

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	
1	Pending Review	HCD	Vacant	0 - No	40%	No	6/18/2024	View		
4	Pending Review	HCD	Vacant	0 - No	35%	No	6/18/2024	View		
2	Pending Review	HCD	Vacant	1 - Low	50%	No	6/18/2024	View		
1	Pending Review	HCD	Head of Household	0 - No	20%	No	6/18/2024	View		

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)		
<input type="button" value="Cancel"/> <input type="button" value="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.