



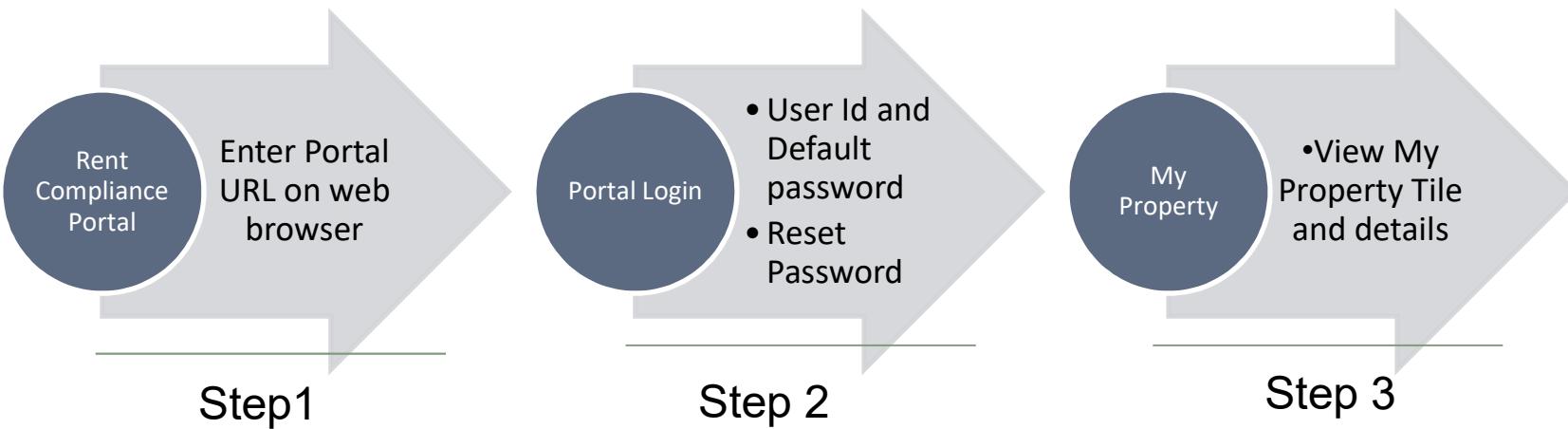
## CSJ – Rent Compliance Portal Borrower / Compliance Contact Onboarding

# Agenda



- Demo and training of Rent Compliance Portal
  - Borrower and Property Manager Login
  - Online Rent Roll Submission
  - Rent Roll submission criteria
  - Rent Roll Review process by City of San Jose
  - Creating a new account
  - Q & A

# Borrower or Property Manager Login



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

- Email information for each property is available.
- Their user accounts has been created already in the system
- Enter Email in the user id
- Default password – CSJ@123
- Reset password – first time only

View Property assigned to Borrowers' user profile

## Demo – Borrower Login

3Di

# Rent Roll(RR) Submission Steps



Download RR excel template

- Previous year copy or
- Blank template

1

2

3

4

Fill info and upload

- Unit Number and basic info prepopulate
- Add/update tenant rent roll info

Submit

- System prompts if any error with data submitted
- Update info to address error and resubmit

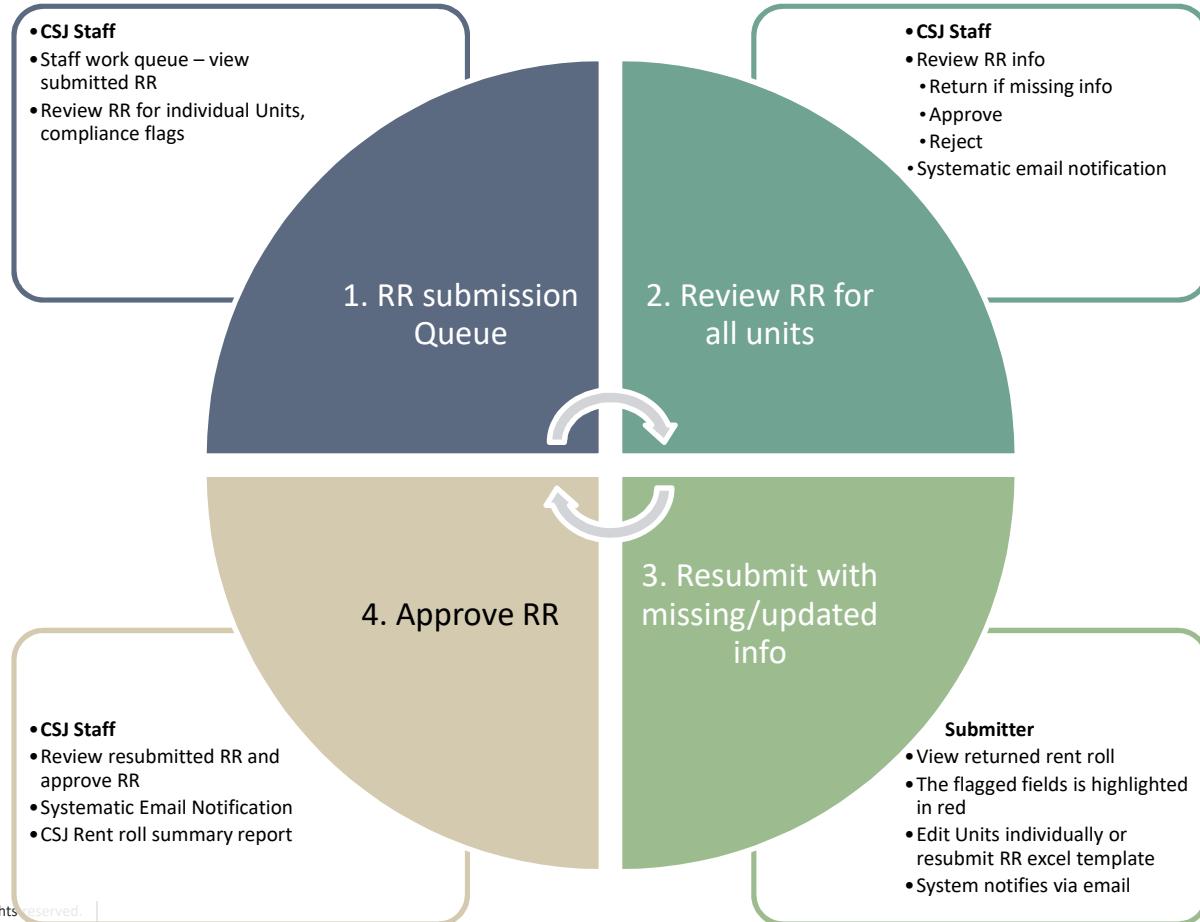
## Rent Roll Submission step - Demo

# Rent Roll Submission Criteria



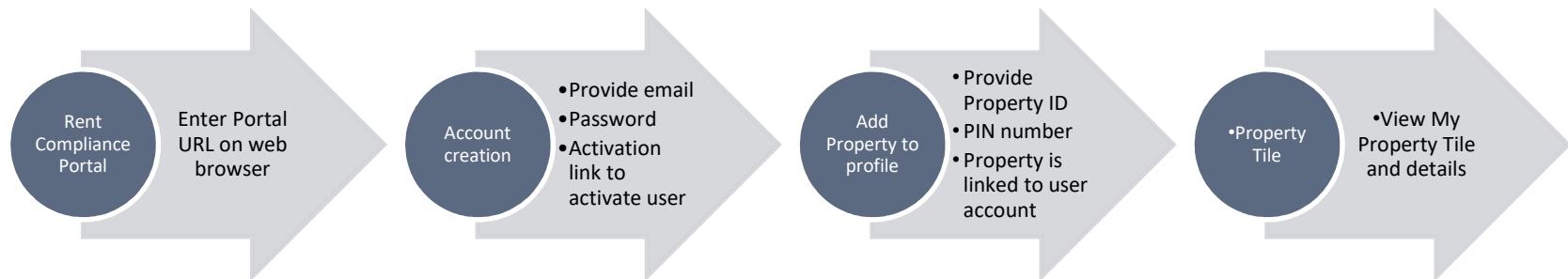
Rent Roll Field	Data Rules	System error / Flag for CSJ review
<b>Missing Info or total Units in rent roll do not match the total units of the property</b>	<p>All required fields in rent roll should not be left blank or total units should match</p> <p>You must choose the values from drop-down...and date must be entered in date field</p>	System Error. Need to be corrected to successfully submit rent roll.
<b>CSJ AMI Level</b>	<p>Total number of units with AMI levels must be within the limit set under affordability restrictions.</p> <p>E.g: if a property has an affordability restriction of 60% AMI level for 10 units, the rent roll submission will have no more than 10 units with 60% AMI level</p>	System Error. Need 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)

# Rent Roll(RR) Review by City



## CSJ Rent Roll Review - Demo

# Email not set-up in the system?



## Step 1

Launch using portal url 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

- Obtain PIN from Borrower or City
- This step is needed Only for first time Login.

## Step 4

View Property and details.

## Q & A

**If you still have questions, email  
[rentcompliance@sanjoseca.gov](mailto:rentcompliance@sanjoseca.gov)**