



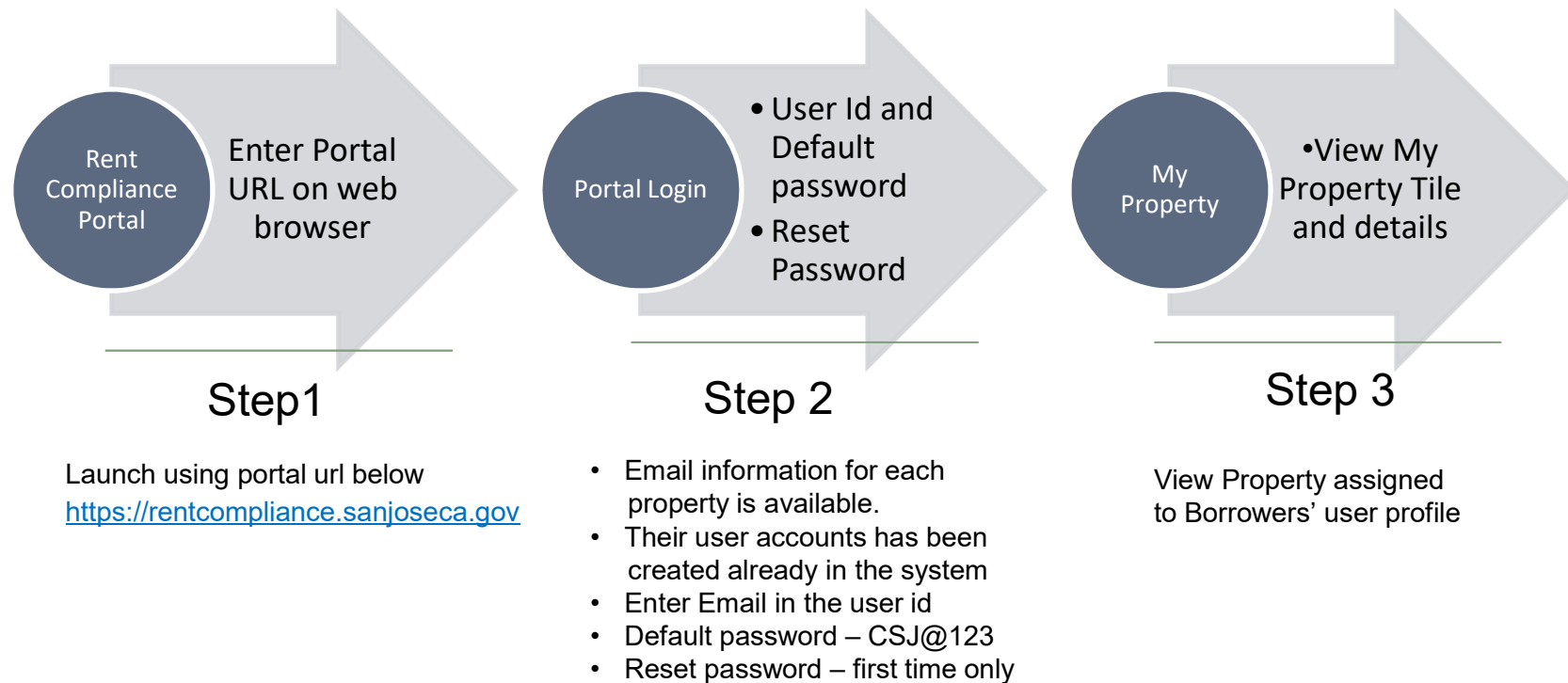
CSJ – Rent Compliance Portal Borrower / Compliance Contact Onboarding

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



Demo – Borrower Login

Rent Roll(RR) Submission Steps



Download RR excel template

- Previous year copy or
- Blank template

1

2

3

4

Certify

- Sign(declaration check box)
- Rent roll effective date

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

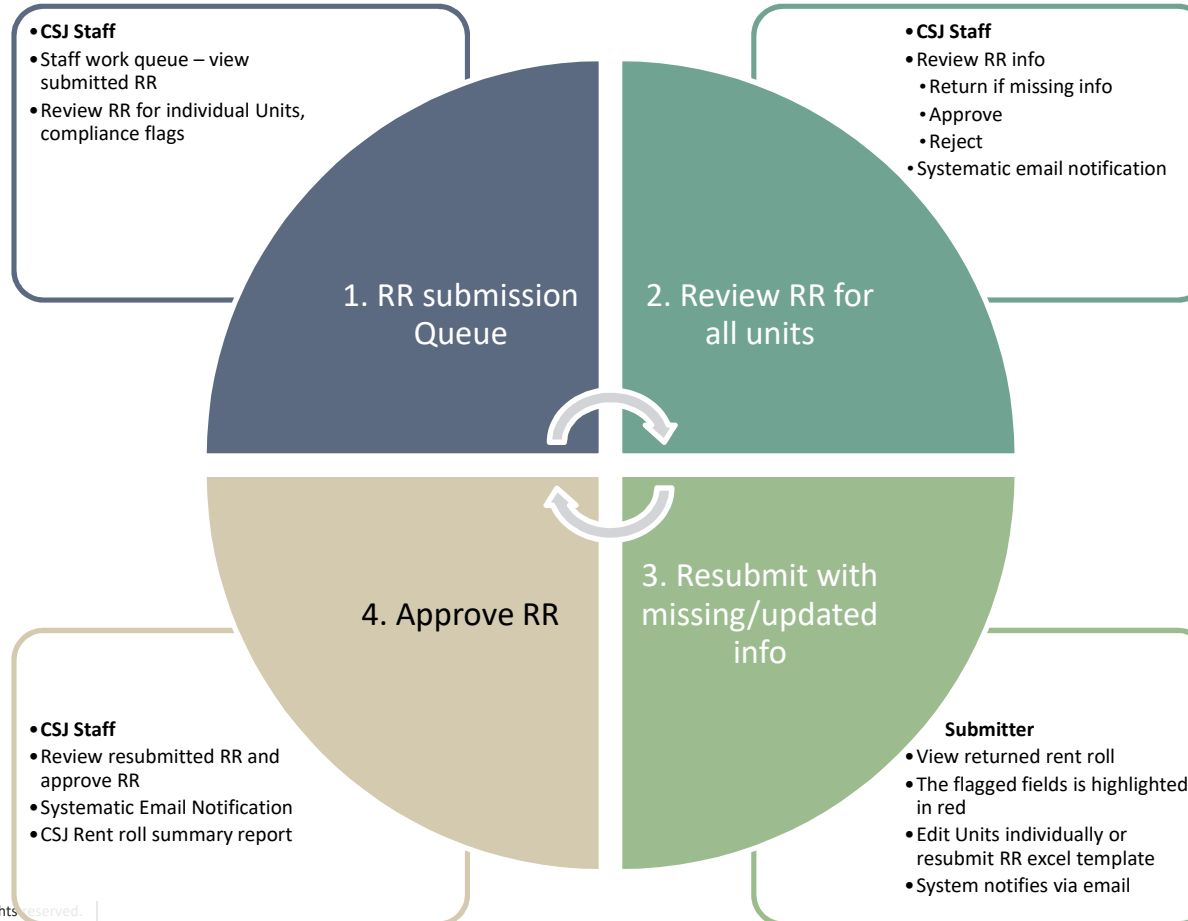
Rent Roll Submission step - Demo

Rent Roll Submission Criteria



Rent Roll Field	Data Rules	System error / Flag for CSJ review
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 You must choose the values from drop-down...and date must be entered in date field	System Error. Need 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. 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	System Error. Need 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)
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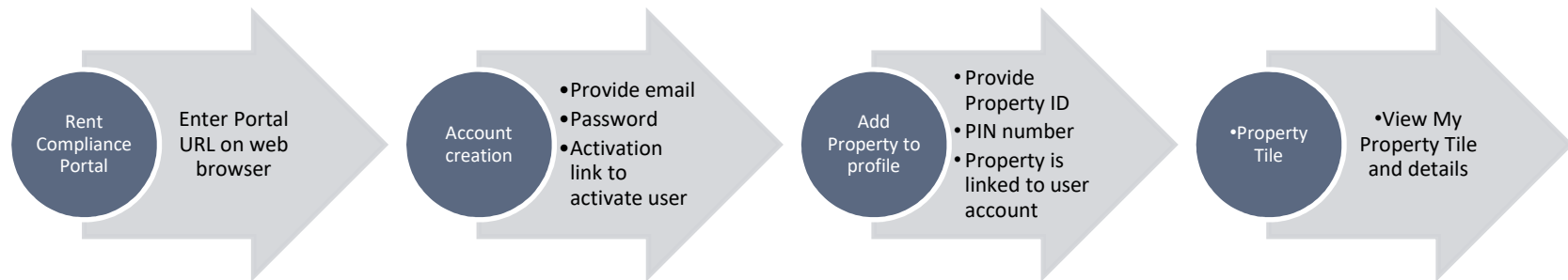
Rent Roll(RR) Review by City





CSJ Rent Roll Review - Demo

Email not set-up in the system?



Step1

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