

LIHTC PORTAL INSTRUCTIONS

The Maryland LIHTC Tenant Demographic End-of-Year Reporting System Instructions

Login Page

If you have registered your property you should have received a user name and password for that property and submission year. If you did not receive the user name and password, please send an email to LIHTC.Application@maryland.gov on the “Login Page”.

If you have received your user name and password, please enter the following:

1. User Name
2. Password
3. Click “Login”

If you have not registered the property please click the “Register” link in the header, and follow the instructions for Registration.

*****IMPORTANT***** Please save the email with your user name and password as EACH property will have a unique password.

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Property Registration

1. If performing **manual data entry** please enter the following required fields:
 - Property Name
 - requesting your Management Name be added to the list
 - Management Name
 - If your management company is not listed, please send an email to LIHTC.Application@maryland.gov
 - First Name
 - Last Name
 - Email Address
 - Upload Type (select “Manual” from the drop down list)

Once the required fields are entered please click the “Register” button. If there is missing or invalid data a validation message will be displayed below the field with a message to correct the data.

NOTE If the “Property Name” already exists for the current submission year it can’t be duplicated. If you have already created the Property for the current submission year, please login to continue data entry or to make edits. Please ensure your email address is correct as that will be your username. An email will also be sent to this email address with your username and password. Please save this email so you do not forget the password. You can use the same email to register multiple properties, but each property will have a unique password.

2. If performing an **XML upload** please enter the following:
 - Management Name
 - If your management company is not listed, please send an email to LIHTC.Application@maryland.gov
 - First Name
 - Last Name
 - Email Address
 - Upload Type (select “XML” from the drop down list)
 - Use the “Choose File” button to select the XML file to be uploaded (all data must be in a single XML file)

Once the required fields are entered please click the “Register” button. If there is missing or invalid data a validation message will be displayed below the field with a message to correct the data

*****NOTE***** If the file name already exists for the current submission year, the upload will be rejected. Also, an XML file must contain the property name. An XML without a property name will be rejected for upload. Additionally, if the property name within the XML file already exists for the current submission year it will be rejected. If you have already uploaded an XML file for the Property and current submission year, please login to continue data entry or to make edits. Please ensure your email address is correct as that will be your username. An email will also be sent to the email address entered with your username and password. Please save the email so you do not forget the password. You can use the same email to register multiple properties, but each property will have a unique password.

*****IMPORTANT***** Please save the email with your user name and password as EACH property will have a unique password.

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Property Pages

On This “Property Details” page there is a “Submit Property” button directly under the “Property Name”. This button is used to submit the property information to The Maryland Department of Housing and Community Development, please only click this button when **ALL Property, Building, Unit, Event, and Tenant data has been entered.**

Property Information

Once you have logged in you will be directed to the Property Page. The Property Page shows the following information:

- Property Name
- Management Company
- Property City
- Property State
- Property Postal Code
- Status
- Submission Year

This information will need to be completed if performing manual entry, also as in most cases XML uploads may have incomplete information. To edit the information, please click the “Edit” link on the right side of the page. This will take you to the “Edit Property” page.

Clicking the “Building” link will take you to the “Building List” page to add or edit Buildings.

Clicking the “Delete” link will take you to the “Delete Property” page where you can confirm deletion of the property.

***Note the Property Name may not be edited once registered. If you need to change the Property Name you must delete the property and complete the Registration process again.

Edit Property

On the “Edit Property” page the “Property Name” and “Management Company” are provided as reference and may not be edited. If you need to change either of these you must delete the property and complete the registration process again.

The following fields can be edited

- Property Identification Number (PIN)
 - This must be in the format MD-##-##
 - If there is no PIN or it is not known please enter MD-99-99
- Property Address (required)
- Property Address 2 (optional)
- Property City (required)
- Property State (default to “MD”, and may not be edited)
- Property Zip Code (5 digits only and is required)

In order to save the data you must click “Update”. If you leave the page before clicking “Update” the data will not be saved and you will need to complete the edits again.

Delete Property

If you need to delete the property please click the “Delete” link next to the property. The “Delete Property” page shows a summary of information to ensure you are logged into the correct property. In order to delete the property the user must click “Delete”. Please keep in mind this will delete all tenant, event, unit and building information for that property.

***IMPORTANT ***

If the property is accidentally deleted this data will need to be reentered or the XML file uploaded again. Please use caution when deleting a property. If you don’t want to delete the property please click the “Back to Property” button.

Navigating the LIHTC Tenant Demographic End-of-Year Reporting System

Please use the bread crumb links to navigate back to previous sections of the application.

Example: if you are on the “Unit List” page, you may navigate back to “Building List” page by clicking the “Building” link that is located under the web page header that reads “LIHTC Tenant Demographic Information System”.

Please avoid using the browser back and forward buttons as that may cause unexpected results.

The Maryland LIHTC Tenant Demographic End-of-Year Reporting System Instructions

Building Pages

Buildings List

When navigating from the “Property” page to the “Building List” a page will open showing all buildings that have been entered or uploaded for the property, as well as a button to create new buildings. If the list is more than 10 buildings, use the page numbers below the “Building List” to see the next set of buildings in the list. You may also use the search feature to find a specific building (this is more practical for a large number of buildings). Use the “Edit” and/or “Delete” links next to the appropriate building to navigate to the building edit and delete pages. To navigate to the “Unit List” page for a particular building click the appropriate “Unit” link in the list.

Create Building

To add a new building, click the “Create Building” button. This will expand the form for data entry. The required fields are:

- BIN (Building Identification Number)
- Building Address
- Building City
- Building County
- Building Zip Code
- Federal Income Designation

If the building does not have a BIN, or it is not known please enter MD-99-99999. Additionally, the BIN must use the format MD-##-#####. Other than a BIN of MD-99-99999, BIN numbers must be unique for each property.

After the data is correctly (validation messages will be displayed for incorrect data entry) entered please click the “Create” button to save the data. The building will be added to the list, and you will be automatically returned to the “Building List” page. In order to save the data you must click “Create”. If you leave the page before clicking “Create” the data will not be saved and you will need to complete the edits again.

Edit Building

On the Edit Building page the same validations apply as on the create page. The required fields are:

- BIN (Building Identification Number)
- Building Address
- Building City
- Building County
- Building Zip Code
- Federal Income Designation

If the building does not have a BIN, or it is not known please enter MD-99-99999. Additionally, the BIN must use the format MD-##-#####. Other than a BIN of MD-99-99999, BIN numbers must be unique for each property.

After you have completed your changes, please click the “Update” button to save them. If you navigate away from the page before clicking update your changes will not be saved. After clicking “Update” you will be automatically returned to the “Building List” page.

Delete Building

If you need to delete a building please click the “Delete” link in the building list for the appropriate unit. Deleting a building is confirmed by clicking the “Delete Building” button at the bottom of the page. Once the “Delete Building” button is clicked the Building (and related data) will be deleted and you will be returned to the “Building List” page. If you do not want to delete the building please click the “Back to Building” button.

*****IMPORTANT***** Deleting a building also deletes all unit, event and tenant data associated with that building. Also, if the data was uploaded via an XML file, a single building may not be re-uploaded. If you unintentionally delete a building you will need to manually reenter the data, or delete the entire property and perform another XML import for that property.

Navigating the LIHTC Tenant Demographic End-of-Year Reporting System

Please use the bread crumb links to navigate back to previous sections of the application.

Example: if you are on the “Unit List” page, you may navigate back to “Building List” page by clicking the “Building” link that is located under the web page header that reads “LIHTC Tenant Demographic Information System”.

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Unit Pages

Unit List

When navigating from the “Building List” page to the “Unit List”, a page will open showing all units that have been entered or uploaded for that building, as well as a button to create new units. If the list is more than 10 units, use the page numbers below the “Unit List” to see the next set of units in the list. You may also use the search feature to find a specific unit (this is more practical for a large number of units). Use the “Edit” and/or “Delete” links next to the appropriate unit to navigate to the unit edit and delete pages. To navigate to the “Event List” page for a particular unit click the appropriate “Event” link in the list.

Create Unit

To create a new unit, click the “Create Unit” button. This will expand the form for data entry. The only required field is:

- Unit Number
 - Must be unique; a unit number can’t be duplicated within the same building
- Number of Bedrooms
- Square Feet

After the data is entered correctly (validation messages will be displayed for incorrect data entry) please click the “Create” button to save the data. The unit will be added and you will be returned to the “Unit List” page. If you navigate away from the page before clicking “Create” your changes will not be saved. After clicking “Create” you will be automatically returned to the “Unit List” page.

Edit Unit

If you need to edit a unit, please click the “Edit” link in the “Unit List” for the appropriate unit. This will take you to the “Edit Unit” page. The same validations apply in the edit page as the create page. After you have completed your changes, please click the “Update” button, which will save your edits and return you to the “Unit List” page. If you navigate away from the page before clicking “Update” your changes will not be saved.

Delete Unit

If you need to delete a unit please click the “Delete” link in the unit list for the appropriate unit. This will take you to the “Delete Unit” page. Once on the delete page you can confirm deletion by clicking the “Delete Unit” button, which will delete the unit (and related data), and return you to the “Unit List” page. If you do not want to delete the unit please click the “Back to Unit” button.

*****IMPORTANT***** Deleting a unit also deletes all event and tenant data associated with that unit. Also, if the data was uploaded via an XML file, single units may not be uploaded. If you unintentionally delete a unit you will need to manually reenter the data, or delete the entire property and perform another XML import.

Navigating the LIHTC Tenant Demographic End-of-Year Reporting System

Please use the bread crumb links to navigate back to previous sections of the application.

Example: if you are on the “Unit List” page, you may navigate back to “Building List” page by clicking the “Building” link that is located under the web page header that reads “LIHTC Tenant Demographic Information System”.

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Tenant Pages

Tenant List

When navigating from the “Event List” page to the “Tenant List”, a page will open showing all tenants that have been entered or uploaded for that event, as well as a button to create new tenants. If the list contains more than 10 tenants, use the page numbers below the “Tenant List” to see the next set of tenants in the list. You may also use the search feature to find a specific tenant (this is more practical for a large number of tenants). Use the “Edit” and/or “Delete” links next to the appropriate tenant to navigate to the tenant edit and delete pages.

Create Tenant

To create new tenants click the “Create Tenant” button. This will expand the form for data entry. The required fields are:

- First Name
- Last Name
- Relationship to, or Head of Household
- Last 4 Digits of Social Security Number
- Also, if the field “Full time Student equals “Yes”, then Student Explanation is displayed to select a value and is recommended for data entry.

After the data is entered correctly (validation messages will be displayed for incorrect data entry) please click the “Create” button to save the data. The Tenant information will be added and you will be returned to the “Tenant List” page. If you navigate away from the page before clicking “Create” your changes will not be saved.

The Maryland LIHTC Tenant Demographic End-of-Year Reporting System Instructions

Event Pages

Event List

When navigating from the “Unit List” page to the “Event List” a page will open showing all events that have been entered or uploaded for that unit, as well as a button to create new events. If the list contains more than 10 events, use the page numbers below the “Event List” to see the next set of events in the list. You may also use the search feature to find a specific event (this is more practical for a large number of events). Use the “Edit” and/or “Delete” links next to the appropriate event to navigate to the event edit and delete pages. To navigate to the “Tenant List” page for a particular event click the appropriate “Tenant” link in the list.

Create Event

To create new events click the “Create Event” button. This will expand the form for data entry. The required fields are:

- Event Type
- Effective Date
 - Must be between January 1st of the reporting year through December 31st of the reporting year
- Household Meets Income Restriction
- Tax Credit Type

After the data is entered correctly (validation messages will be displayed for incorrect data entry) please click the “Create” button to save the data. The event will be added and you will be returned to the “Event List” page. If you navigate away from the page before clicking “Create” your changes will not be saved. After clicking “Create” you will be automatically returned to the “Event List” page.

Edit Event

If you need to edit an event, please click the “Edit” link in the “Event List” for the appropriate event. This will take you to the “Edit Event” page. The same validations apply in the edit page as the create page. After you have completed your changes, please click the “Update” button, which will save your edits and return you to the “Event List” page. If you navigate away from the page before clicking “Update” your changes will not be saved.

Delete Event

If you need to delete an event please click the “Delete” link in the event list for the appropriate event. This will take you to the “Delete Event” page. Once on the delete page you can confirm deletion by clicking the “Delete Event” button, which will delete the event (and related data), and return you to the “Event List” page. If you do not want to delete the event please click the “Back to Event” button.

*****IMPORTANT***** Deleting an event also deletes all tenant data associated with that event. Also, if the data was uploaded via an XML file, single events may not be uploaded. If you unintentionally delete an event you will need to manually reenter the data, or delete the entire property and perform another XML import.

Navigating the LIHTC Tenant Demographic End-of-Year Reporting System

Please use the bread crumb links to navigate back to previous sections of the application.

Example: if you are on the “Unit List” page, you may navigate back to “Building List” page by clicking the “Buildings” link that is located under the web page header that reads “LIHTC Tenant Demographic Information System”.

Please avoid using the browser back and forward buttons as that may cause unexpected results.

Edit Tenant

If you need to edit tenant information, please click the “Edit” link in the “Tenant List” for the appropriate event. This will take you to the “Edit Tenant” page. The same validations apply in the edit page as the create page. After you have completed your changes, please click the “Update” button, which will save your edits and return you to the “Tenant List” page. If you navigate away from the page before clicking “Update” your changes will not be saved.

Delete Tenant

If you need to delete a Tenant please click the “Delete” link in the tenant list for the appropriate tenant. This will take you to the “Delete Tenant” page. Once on the delete page you can confirm deletion by clicking the “Delete Tenant” button, which will delete the tenant, and return you to the “Tenant List” page. If you do not want to delete the tenant please click the “Back to Tenant” button.

IMPORTANT All events need at least one tenant. If you unintentionally delete a tenant you will need to manually reenter the data, or delete the entire property and perform another XML import.

Navigating the LIHTC Tenant Demographic End-of-Year Reporting System

Please use the bread crumb links to navigate back to previous sections of the application.

Example: if you are on the “Unit List” page, you may navigate back to “Building List” page by clicking the “Building” link that is located under the web page header that reads “LIHTC Tenant Demographic Information System”.

Please avoid using the browser back and forward buttons as that may cause unexpected results.

Edit Unit

If you need to edit a unit, please click the “Edit” link in the “Unit List” for the appropriate unit. This will take you to the “Edit Unit” page. The same validations apply in the edit page as the create page. After you have completed your changes, please click the “Update” button, which will save your edits and return you to the “Unit List” page. If you navigate away from the page before clicking “Update” your changes will not be saved.

Delete Unit

If you need to delete a unit please click the “Delete” link in the unit list for the appropriate unit. This will take you to the “Delete Unit” page. Once on the delete page you can confirm deletion by clicking the “Delete Unit” button, which will delete the unit (and related data), and return you to the “Unit List” page. If you do not want to delete the unit please click the “Back to Unit” button.

*****IMPORTANT***** Deleting a unit also deletes all event and tenant data associated with that unit. Also, if the data was uploaded via an XML file, single units may not be uploaded. If you unintentionally delete a unit you will need to manually reenter the data, or delete the entire property and perform another XML import.

Navigating the LIHTC Tenant Demographic End-of-Year Reporting System

Please use the bread crumb links to navigate back to previous sections of the application.

Example: if you are on the “Unit List” page, you may navigate back to “Building List” page by clicking the “Building” link that is located under the web page header that reads “LIHTC Tenant Demographic Information System”.

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Submit Property

After logging in, on the “Property Details” page there is a “Submit Property” button directly under the “Property Name”. This button is used to submit the property information to The Maryland Department of Housing and Community Development, please only click this button when **ALL Property, Building, Unit, Event, and Tenant data has been entered.**

If an XML import was performed all property information should be ready for submission. However, if you need to make edits, additions, or deletions please do so before clicking the “Submit Property” button. Once all the data has been uploaded and/or edited please click the “Submit Property” button.

If you are performing manual entry please only click this button after **ALL Property, Building, Unit, Event, and Tenant data has been entered.**

*****Example:** if you enter the property information, one building, one unit, one event and one tenant and then click “Submit Property” the property will submit and you cannot make further additions/edits even though you may have more buildings, units, etc. to enter.

If you accidentally submit the property before all information is entered please send an email to LIHTC@maryland.gov indicating you need the property to be unlocked. Please include the exact name of the property as shown in the “Property Name” field.

Once the “Submit Property” button is clicked a validation process takes place to ensure the data is in an acceptable format and contains all required elements to submit to HUD. If there is missing data, formatting issues, and other edits that need to be made the validation page will display all records that need edited.

Please follow the steps below for each message you may receive:

1. **Message: “Please update property zip code”**
 - a. **Correction:** Please click the “Edit” link to the right of the message. This will take you directly to the “Edit Property” page where the “Property Zip Code” can be corrected to be a valid 5 digit zip code. After the change is made, please click the “Update” button. There may be other edits needed on this page, and you will be prompted to correct those as well. If this was the only validation that needed to

be corrected, your property will then submit, if other edits are needed you will be returned to the “Validate Property” page.

2. **Message: “Please update Property Identification Number (PIN), to the correct format”**

- a. **Correction:** Please click the “Edit” link to the right of the message. This will take you directly to the “Edit Property” page where the PIN can be corrected to a valid PIN number. After the change is made, please click the “Update” button. There may be other edits needed on this page, and you will be prompted to correct those as well. If this was the only validation that needed to be corrected, your property will then submit, if other edits are needed you will be returned to the “Validate Property” page.

3. **Message: “Please update property address information”**

- a. **Correction:** Please click the “Edit” link to the right of the message. This will take you directly to the “Edit Property” page where you can update the property address information. After the change is made, please click the “Update” button. There may be other edits needed on this page, and you will be prompted to correct those as well. If this was the only validation that needed to be corrected, your property will then submit, if other edits are needed you will be returned to the “Validate Property” page.

4. **Message: “No buildings exist for the property, please add building information”**

- a. **Correction:** Please click the “Edit” link to the right of the message. This will take you to the “Add New Building” page where a new building can be added by clicking the “Create Building” button and entering the data. After the data is entered please click the “Create” button. If other buildings are needed please click the “Property” navigation link near the top left of the page to navigate to the “Property Details” page and follow the instructions to continue adding all buildings.

5. **Message: “Please update Building Identification Number (BIN), to the correct format”**

- a. **Correction:** Please click the “Edit” link to the right of the message. This will take you to the “Edit Building” page where the BIN can be corrected. After the change is made please click the “Update” button. There may be other edits needed on this page, and you will be prompted to correct those as well. If this was the only validation that needed to be corrected, your property will then submit, if other edits are needed you will be returned to the “Validate Property” page.

6. **Message: “Please update building address information”.**
 - a. **Correction:** Please click the “Edit” link to the right of the message. This will take you to the “Edit Building” page where building address information can be corrected. After the changes are made please click the “Update” button. There may be other edits needed on this page, and you will be prompted to correct those as well. If this was the only validation that needed to be corrected, your property will then submit, if other edits are needed you will be returned to the “Validate Property” page.

7. **Message: “One or more BIN #'s are duplicated; this is not allowed, please update”.**
 - a. **Correction:** Please click the “Edit” link to the right of the message. This will take you to the “Edit Building” page where the BIN number can be edited to be unique for the property. After the changes are made please click the “Update” button. There may be other edits needed on this page, and you will be prompted to correct those as well. If this was the only validation that needed to be corrected, your property will then submit, if other edits are needed you will be returned to the “Validate Property” page.

8. **Message: “No units exist for the building, please add unit information”.**
 - a. **Correction:** Please click the “Edit” link to the right of the message. This will take you to the “Add New Unit” page where a new unit can be added by clicking the “Create Unit” button and entering the data. After the data is entered please click the “Create” button. If other units are needed for that specific building, please click the “Property” navigation link near the top left of the page to navigate to the “Property Details” page and follow the instructions to continue adding all units.

9. **Message: “One or more unit #'s are duplicated; this is not allowed, please update”.**
 - a. **Correction:** Please click the “Edit” link to the right of the message. This will take you to the “Edit Unit” page where the unit number can be edited to be a unique number for that specific building. After the changes are made please click the “Update” button. There may be other edits needed on this page, and you will be prompted to correct those as well. If this was the only validation that needed to be corrected, your property will then submit, if other edits are needed you will be returned to the “Validate Property” page.

10. **Message: “No events exist for the unit, please add event information”.**
 - a. **Correction:** Please click the “Edit” link to the right of the message. This will take you to the “Add New Event” page where a new event can be added by clicking the “Create Event” button and entering the data. After the data is entered please click the “Create” button. It is only required to enter the most recent event for the

unit, or status of the event at year's end. Optionally, you may enter all events for the unit by clicking the "Property" navigation link near the top left of the page to navigate to the "Property Details" page and follow the instructions to continue adding events.

11. **Message: "Please update annual income"**.

- a. **Correction:** Please click the "Edit" link to the right of the message. This will take you to the "Edit Event" page where the annual income can be edited. After the changes are made please click the "Update" button. There may be other edits needed on this page, and you will be prompted to correct those as well. If this was the only validation that needed to be corrected, your property will then submit, if other edits are needed you will be returned to the "Validate Property" page.

12. **Message: "One or more problems exist with the event information, please update"**

- a. **Correction:** Please click the "Edit" link to the right of the message. This will take you to the "Edit Event" page where you should click the "Update" button to see all validation issues. Please correct as necessary. After the changes are made please click the "Update" button again. If this was the only validation that needed to be corrected, your property will then submit, if other edits are needed you will be returned to the "Validate Property" page.

13. **Message: "No tenant exists for the event, please add at least 1 tenant"**.

- a. **Correction:** Please click the "Edit" link to the right of the message. This will take you to the "Add New Tenant" page where a tenant can be added by clicking the "Create Tenant" button and entering the data. After the data is entered please click the "Create" button. If this was the only validation that needed to be corrected, your property will then submit, if other edits are needed you will be returned to the "Validate Property" page.

14. **Message: "One or more problems exist with the tenant information, please update"**.

- a. **Correction:** Please click the "Edit" link to the right of the message. This will take you to the "Edit Tenant" page where you should click the "Update" button to see all validation issues. Please correct as necessary. After the changes are made please click the "Update" button again. If this was the only validation that needed to be corrected, your property will then submit, if other edits are needed you will be returned to the "Validate Property" page.