



WHEDA WEBINARS

Using Procorem for Unit Status
Report Submissions



PROCOREM OVERVIEW

WHEDA is moving to the use of Procorem for the following benefits:

- Less onsite time
- Less intrusive on tenants and developer/owner/agent
- Easier retrieval of demographic data
- Historical record of all transactions
- Record of notifications (both ways)
- Record of data input (both ways)
- Support of application process for all funding
- Long term cost savings for all
- Environmentally friendly

ACCESS TO PROCOREM

- Delegated Administrator Agreement (DAA)
- DA provides access
 - Owner and Management Staff
- Receive Invitation if First Time
 - Create Username and Password
 - Once setup, you will only receive notifications of new WorkCenters
- If issues send email to DAA@wheda.com

LOGGING INTO PROCOREM

- <https://app.procorem.com/login>
- Navigate to WorkCenter
 - Click View All WorkCenters
or
 - Search
- Unit Status Report
 - Compliance Years

USR REPORTING STEPS

- Entry Method
 - Manual Entry
 - XML file upload
- Validate Tenant Events
- Submit Tenant Events
 - Advises WHEDA you have completed the USR Report
 - Locks Events from further editing

Tip:

- Export Events and review before clicking Submit



MANUAL ENTRY

- Entry Examples:
 - Move-in (MI)
 - Recertification (R)
 - Move-out (MO)
 - Transfer Out/In

Tips:



- Enter zero rent and income record
- Capture Info from TIC
- Click Program Type
 - Click Student Exemption if Full-time Student Household
- Click Save before leaving any page

XML TENANT EVENT ENTRY

- Prep Software for XML Creation
 - Match your software to key data fields
 - BINs & Addresses by HFA Number located on website
 - Property Name
 - Building Street Address
 - BIN
 - Match Unit Numbers
 - In Procorem: Unit Status Report > Compliance Periods > YYYY Tenant Events
- Create an XML file for 1/1/YYYY - 12/31/YYYY
- Upload XML File

VALIDATION

- Click Validate Tenant Events Button
- If changes required for Tenant Events
 - Manual Entry Method - make changes in Tenant Events
 - XML Method - make changes in management software and re-import

Tips:



- Each time an XML file is Imported, all events for the Compliance Year are overwritten
- Help document with many common error messages located on website:
 - Common Fixes for Tenant Submissions
- Click Validation Button again before Submitting

SUBMISSION

- Click Submit Tenant Events
 - Advises WHEDA you have completed the USR Report
 - Locks Events from further editing

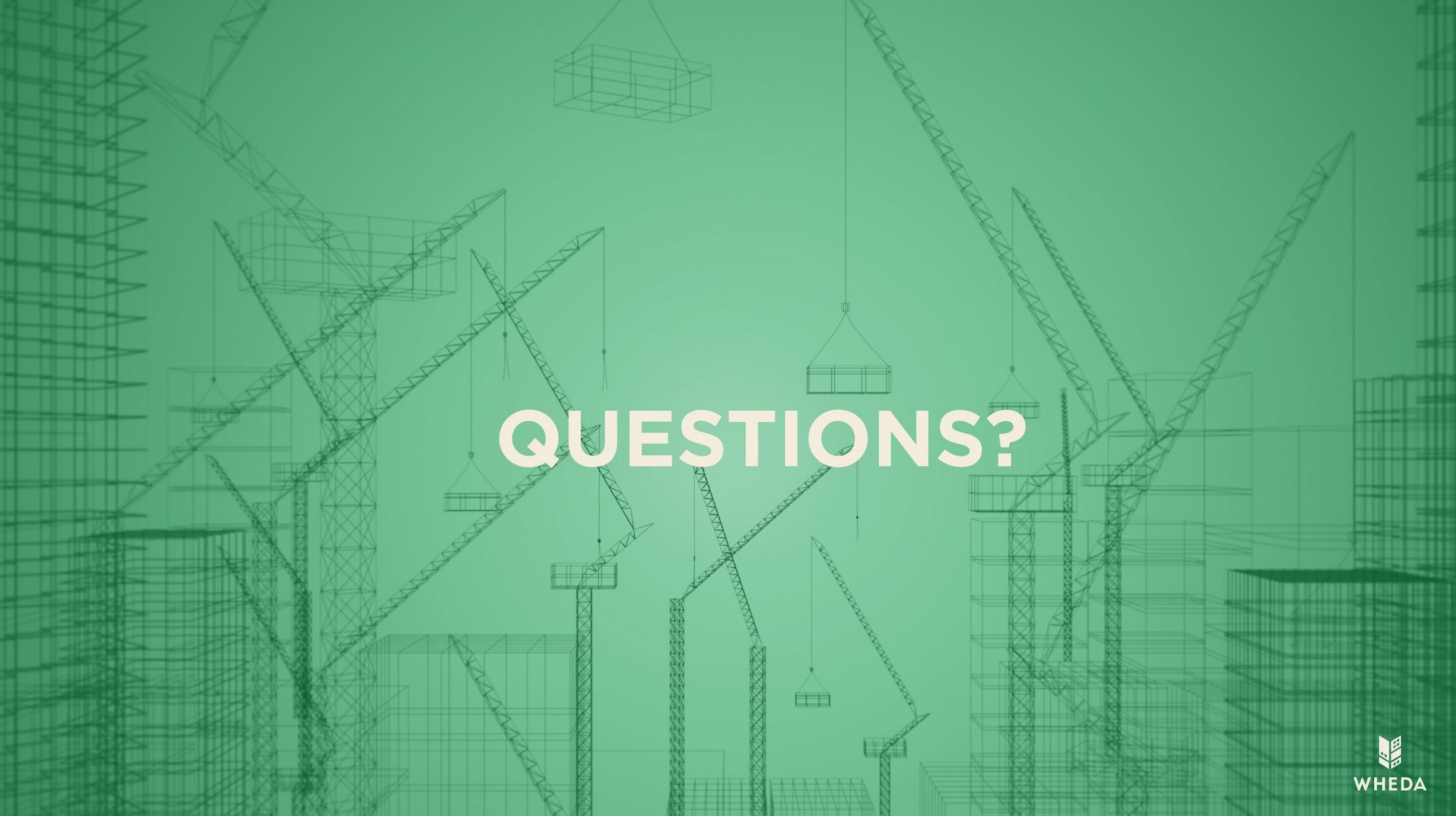
Tip:

- Export Events to a report before submitting for one final check



XML TENANT EVENT HELP

- www.wheda.com
- Hover over Developers and Property Managers
- Click Form, Manuals and Resources
 - Match your software to key data fields
 - BINs & Addresses by HFA Number
 - Property Name
 - Building Street Address
 - BIN
 - Match Unit Numbers
 - In Procorem: Unit Status Report > Compliance Periods > YYYY Tenant Events
 - Common Fixes for Tenant Submissions



QUESTIONS?



WHEDA

CONTACT A HOUSING MANAGEMENT OFFICER

[Property Managers | WHEDA](#)

<https://www.wheda.com/developers-and-property-managers/property-managers>