NEW YORK CITY HOUSING AUTHORITY

Public Housing

Annual Recertification

Manual

DRAFT

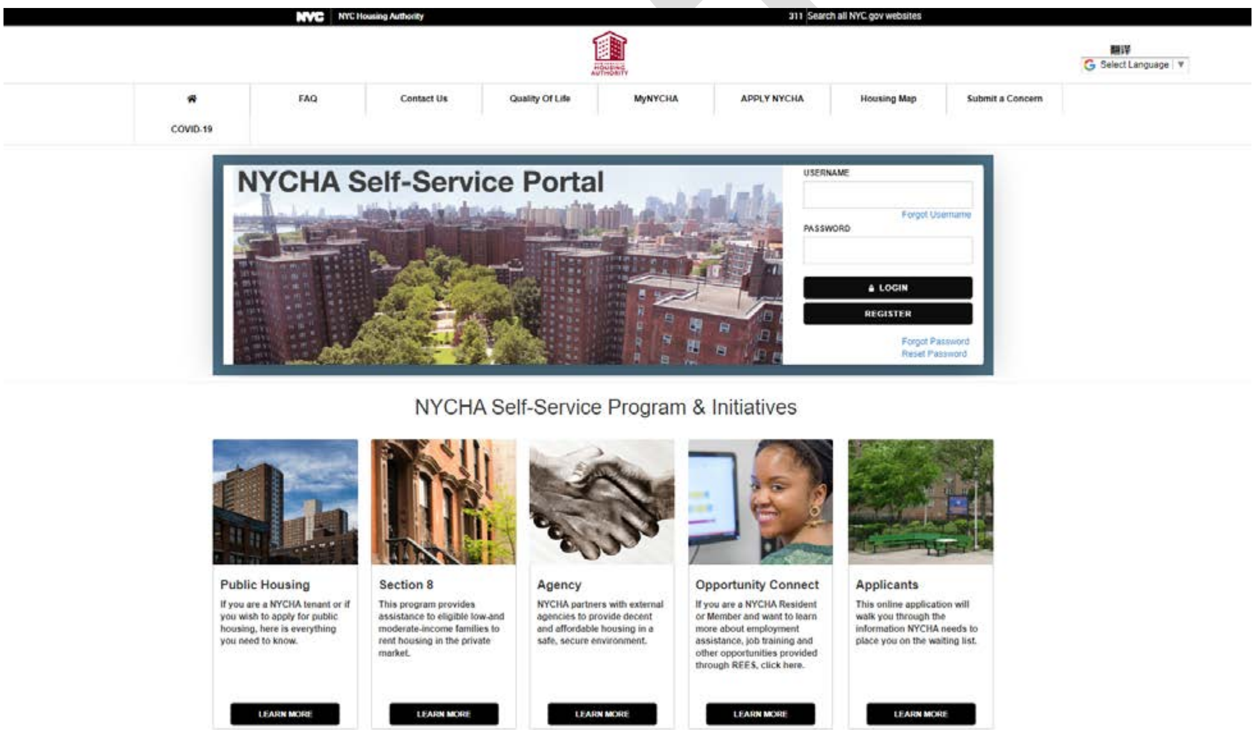
INFORMATION TECHNOLOGY PMO

Contents

INSTRUCTIONS FOR COMPLETING ANNUAL RECERTIFICATION ONLINE

Self-Service Portal Login Information:

Login Page: The Tenant Self Service Portal link is accessible from the NYCHA website. Once the Public Housing tenant clicks on the Tenant Self-Service Portal link, they will be taken to the following landing page:

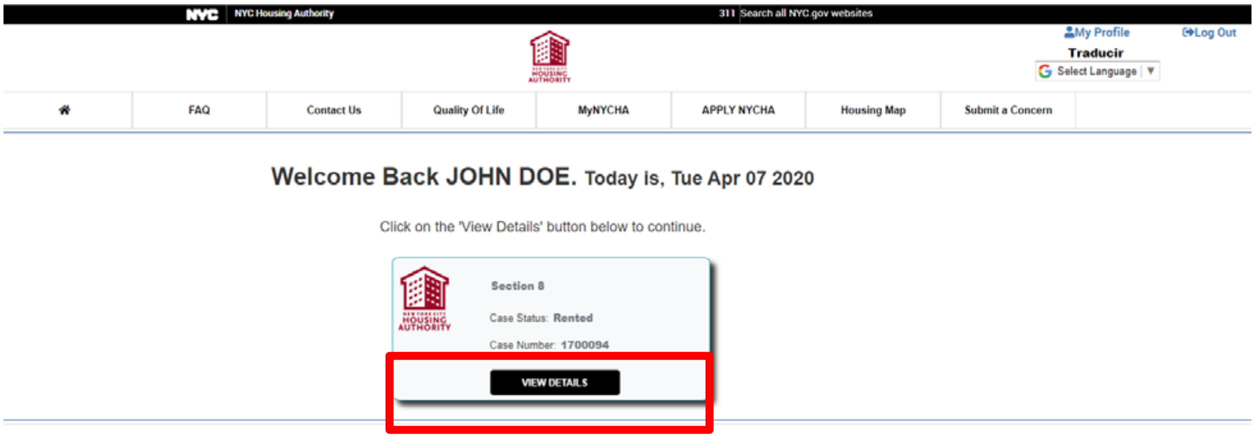


Enter Credentials: The Public Housing tenant must be the head of household and have a valid USERNAME and PASSWORD to login and use the Tenant Self-Service portal.

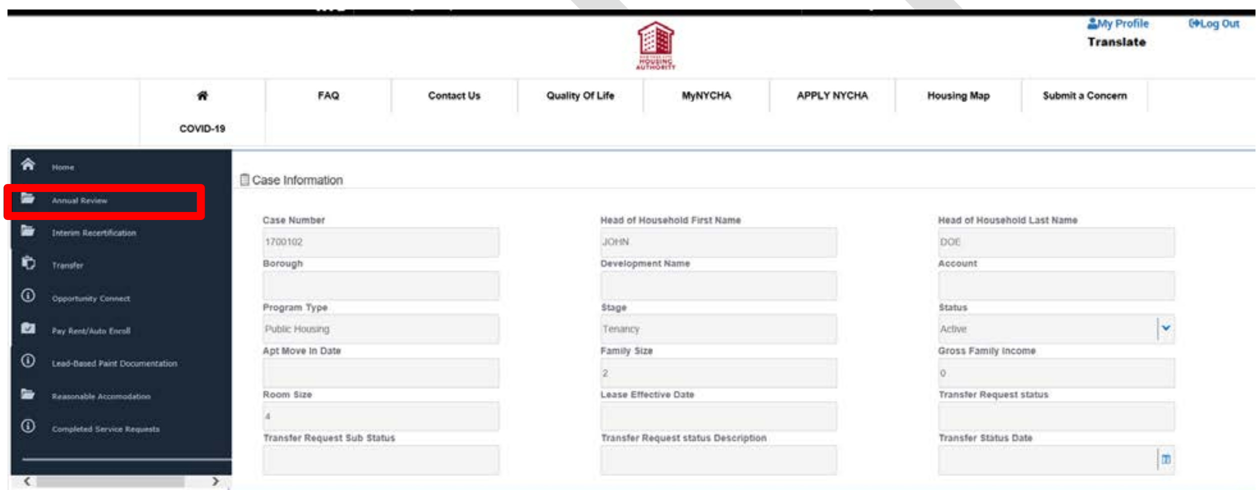
⇨ Enter

- **USERNAME**: **JOHNDOE123**
- **PASSWORD:** *********

Case Information: The tenant will be taken to the **Home** page of the portal. The tenant will be taken to a page that displays their basic case information. The tenant should click on the **View Details button** given below.

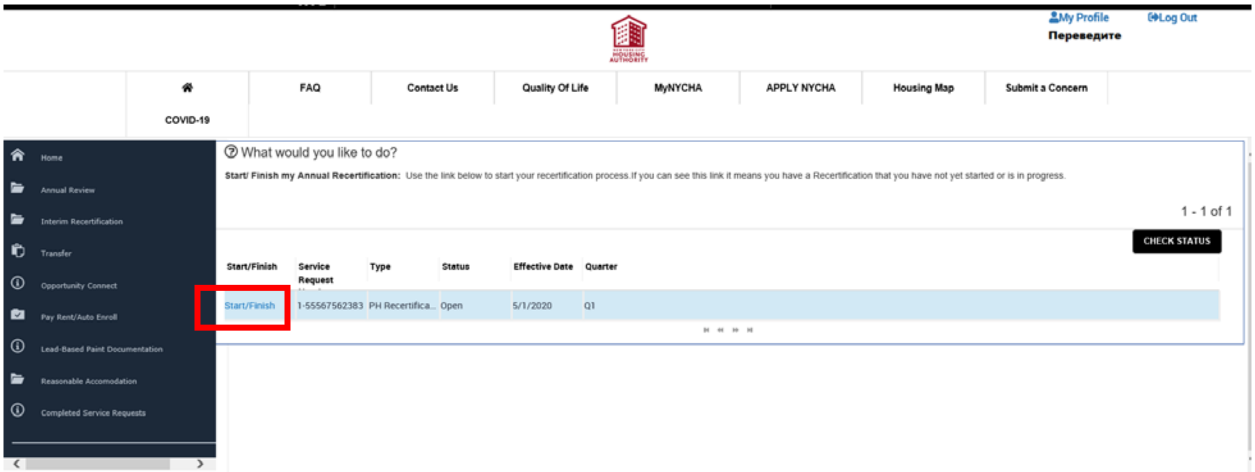


Annual Review: The tenant will be taken to a page that displays their detailed Case information. The tenant should click **Annual review Tab** on the left pane as shown below.



Initiate Annual Recertification:

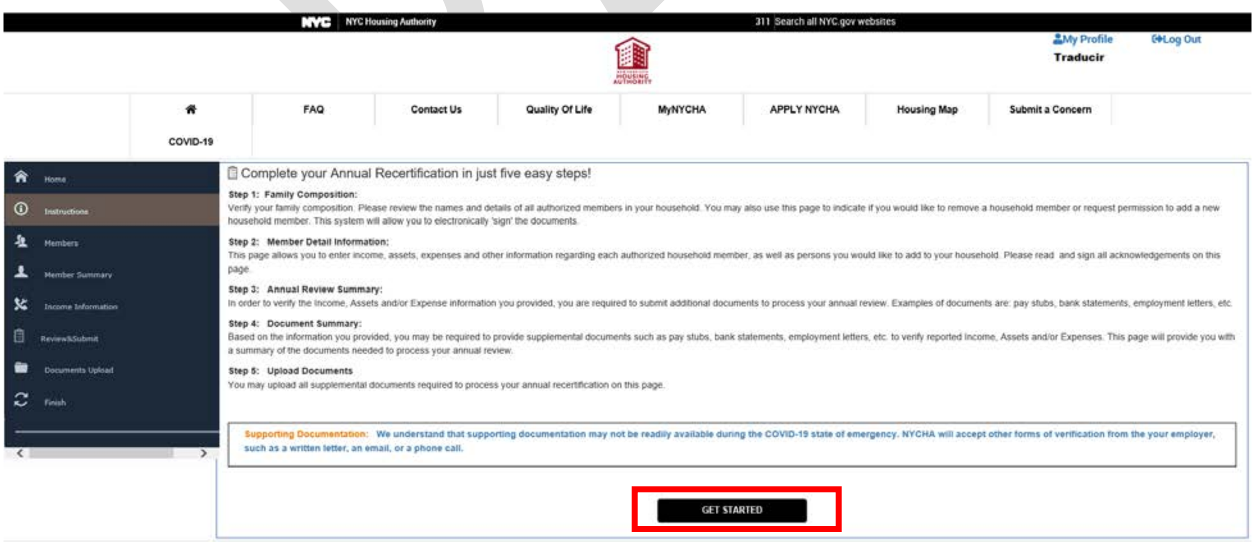
The tenant should click on the Start/Resume my Annual Recertification link to begin the recertification process.



Annual Recertification Instructions:

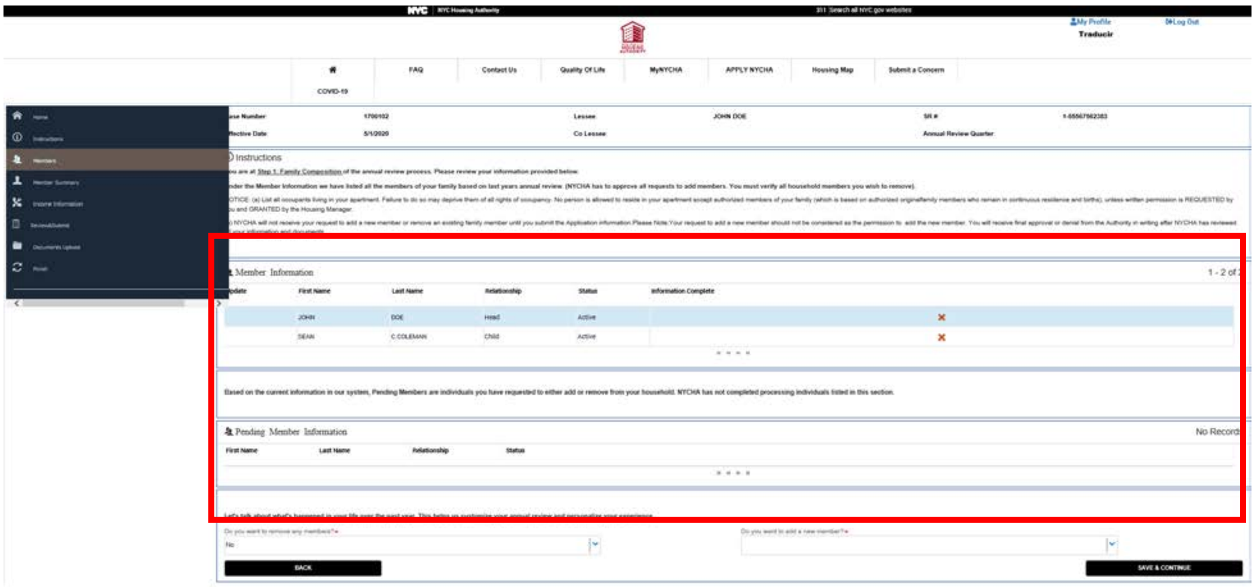
Once the tenant clicks on the **Start/Resume my Annual Recertification** link, they will be taken to the Instruction landing page. This page provides instructions for completing their Annual Recertification on the portal.

- The tenant should click on the Get Started button to begin.



Step 1: Verify Family Composition:

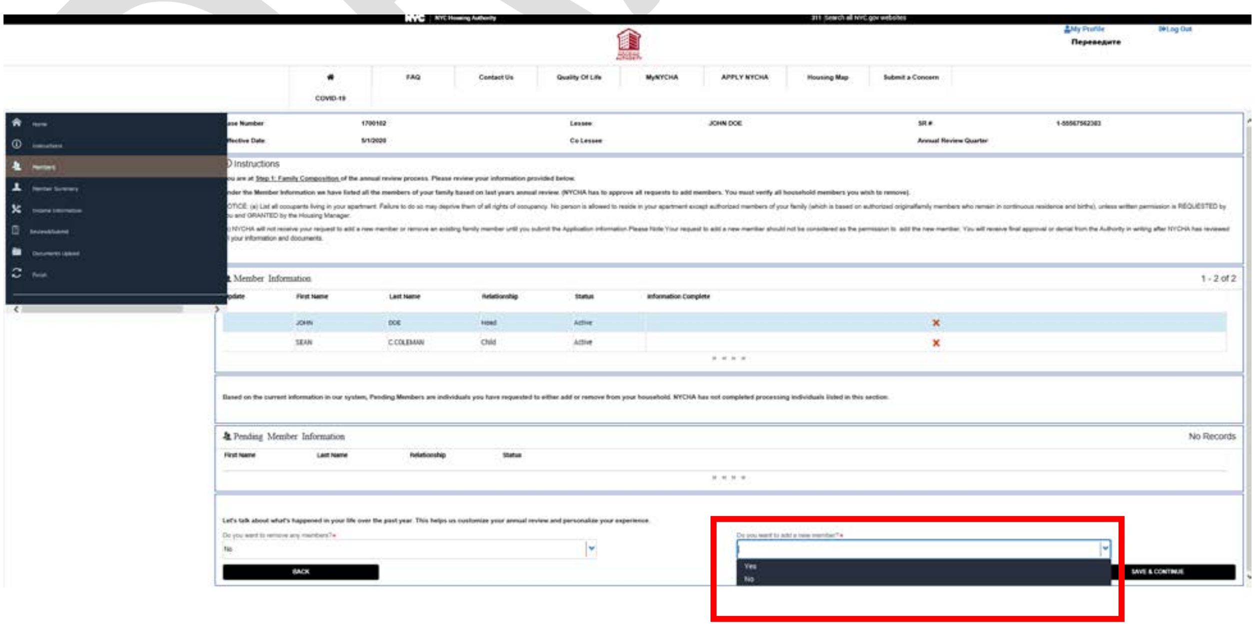
This page displays the most current household information available in Siebel.
All Active Household Members currently residing in the household are listed in the Member Information section. The tenant must review the information presented in this section.



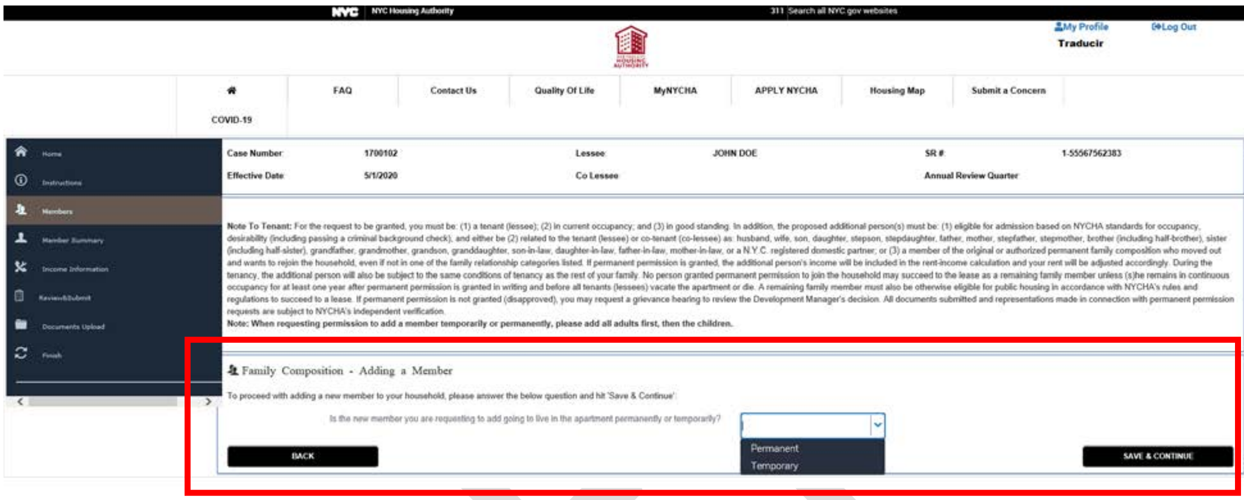
(a) Adding a Family Member (if applicable)

Tenants may request to add member(s) to their household while completing their recertification on the portal.

To add a member, the tenant should anwer the question **“ Do you want to add any member”** button under the **Member Information** section.



A new page will open. The tenant must provide information about the proposed addition. The following fields are required:



(b) Member Information :

- **First Name** of the proposed addition
- **Last Name** of the proposed addition
- **Date of Birth** of the proposed addition

  <u>Note: The birth date must be entered in the following format: MM/DD/YYYY. For example, 06/28/1980 or 01/05/1956</u>
- **Sex** of the proposed addition
- **Relationship** of the proposed addition (to head of household).
- **Citizenship Status** of the proposed addition.
- **Social Security Number (SSN)** of the proposed addition.

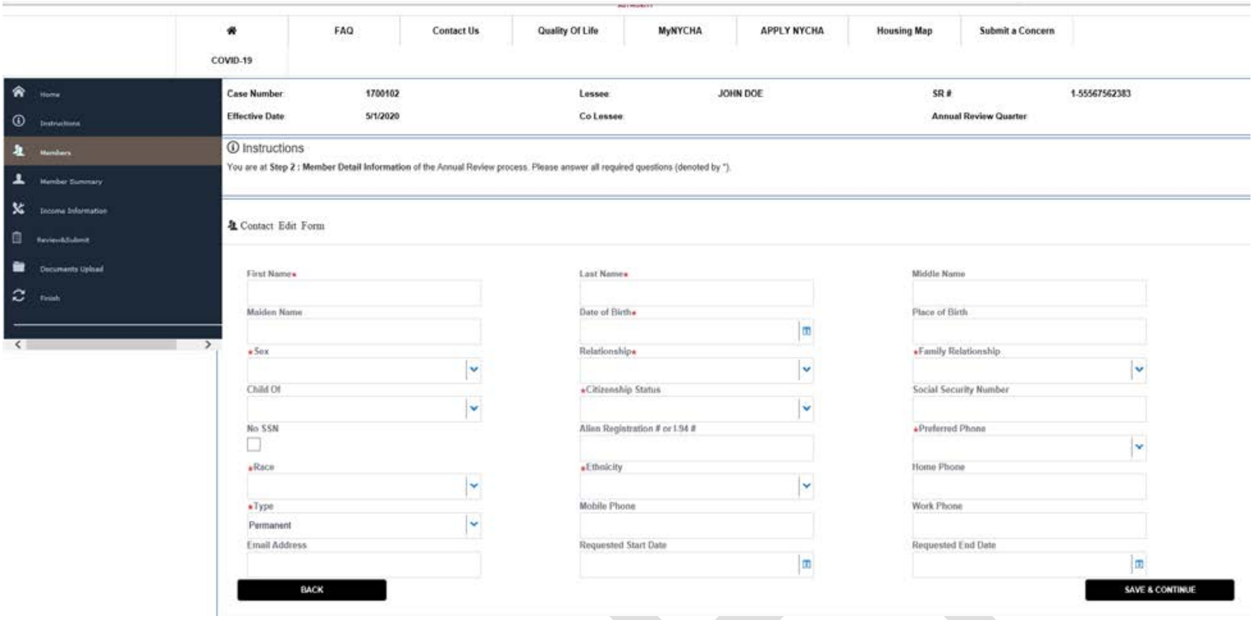
  The social security number must be entered in the following format (<u>**without**</u> the dashes included): 123456789.

  <u>NOTE: If the proposed addition does not have an SSN, the tenant must click on the **No SSN** checkbox and enter the Alien Registration # or I-94 # of the proposed addition.</u>

In addition to the required fields, the tenant should provide the following information regarding the new member:

- **Disability** status of the proposed addition (Y/N)
- **Race** of the proposed addition
- **Ethnicity** of the proposed addition
- **Mobile, Home or Work** telephone number for the proposed addition

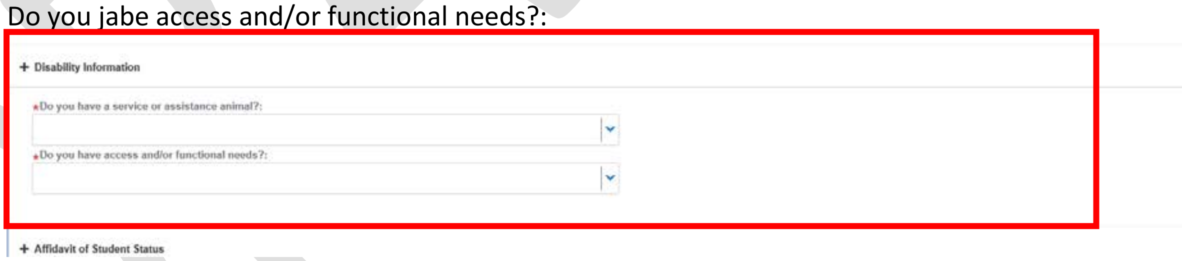
- **Email Address** for the proposed addition



(c) DisabliityInformation

The tenant is required to answer yes or no (Y/N) to the following questions:

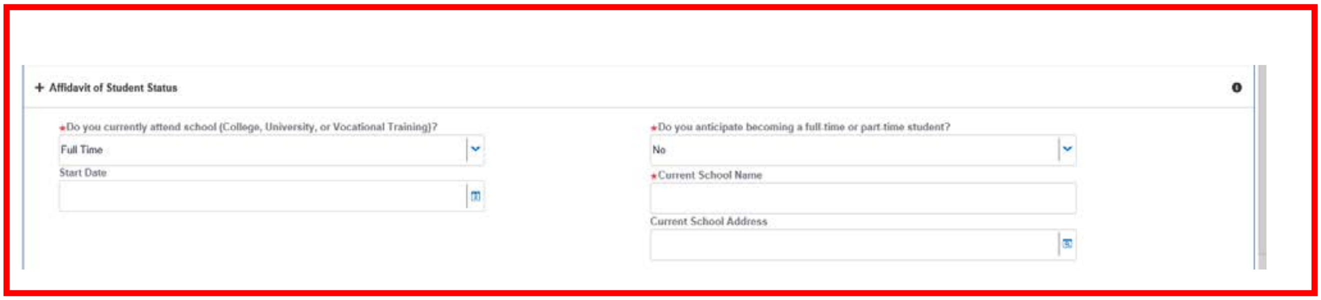
- Do you have a service or assistance animal?:
- Do you jabe access and/or functional needs?:



(d) Affidavit of Student Status:

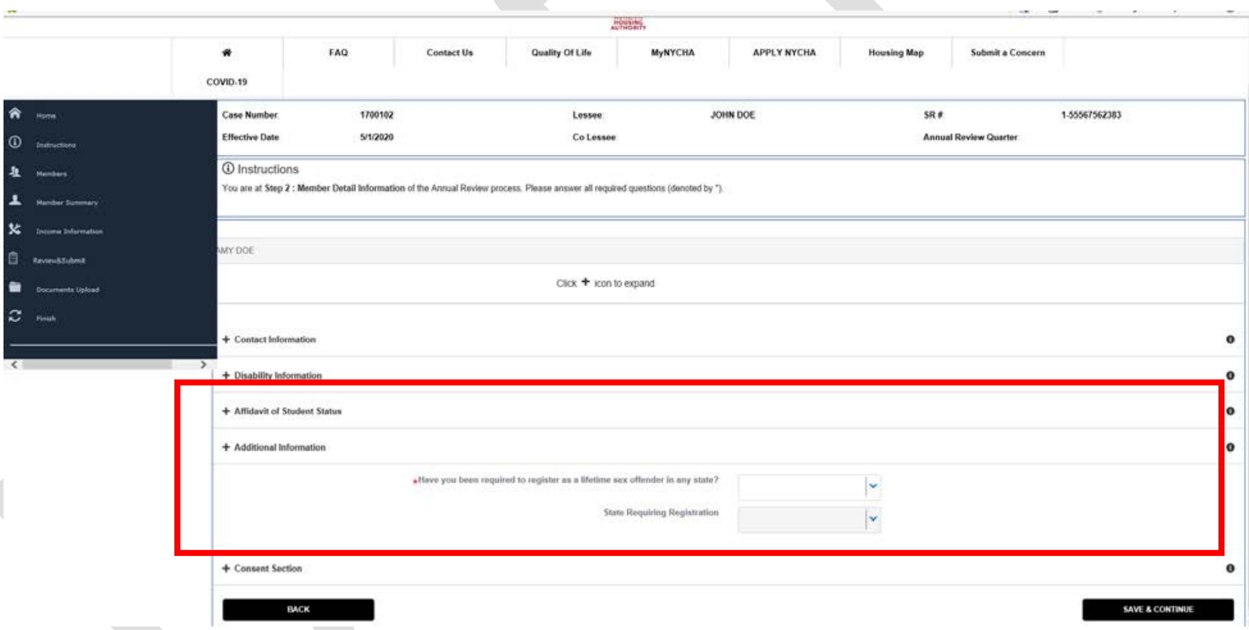
The tenant is required to answer yes or no (Y/N) to the following questions:

- **Does this member currently attend school (College, University, or Vocational Training)?**
- Please note that the tenant answers 'Y' to this questions, they must provide the start date for when the member began attending school. The date must be entered in the following format: MM/DD/YYYY. For example, 06/28/1980 or 01/05/1956.
- **Current School Name**
- **Current School Address**
- Do you anticipate becoming a full-time or part-time student? If you answer 'yes' then they must provide **Future School Name** and **Future School Address.**



(e) Additional Information contact:

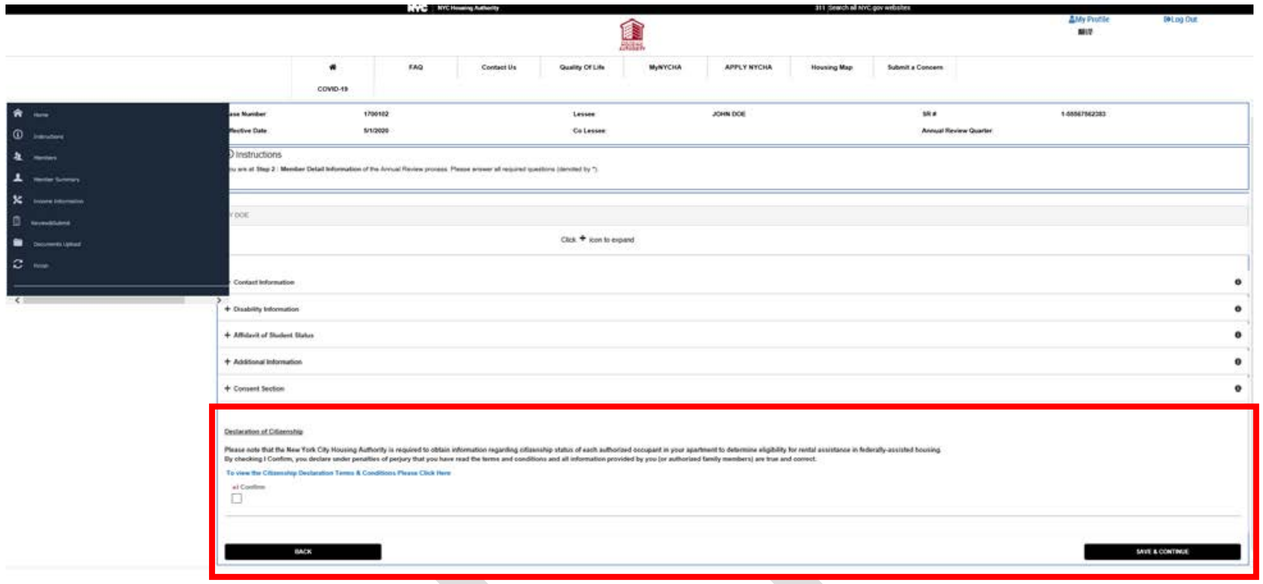
Please enter the requested information if you have any emeregency contact that you would like to include.



(f) Consent to Release Information and Declaration of Citizenship

For all household additions 18 years of age or older, the tenant must click on the **I Confirm** checkbox and the proposed addition must provide their signature (their full name) in the **Signed By** box.

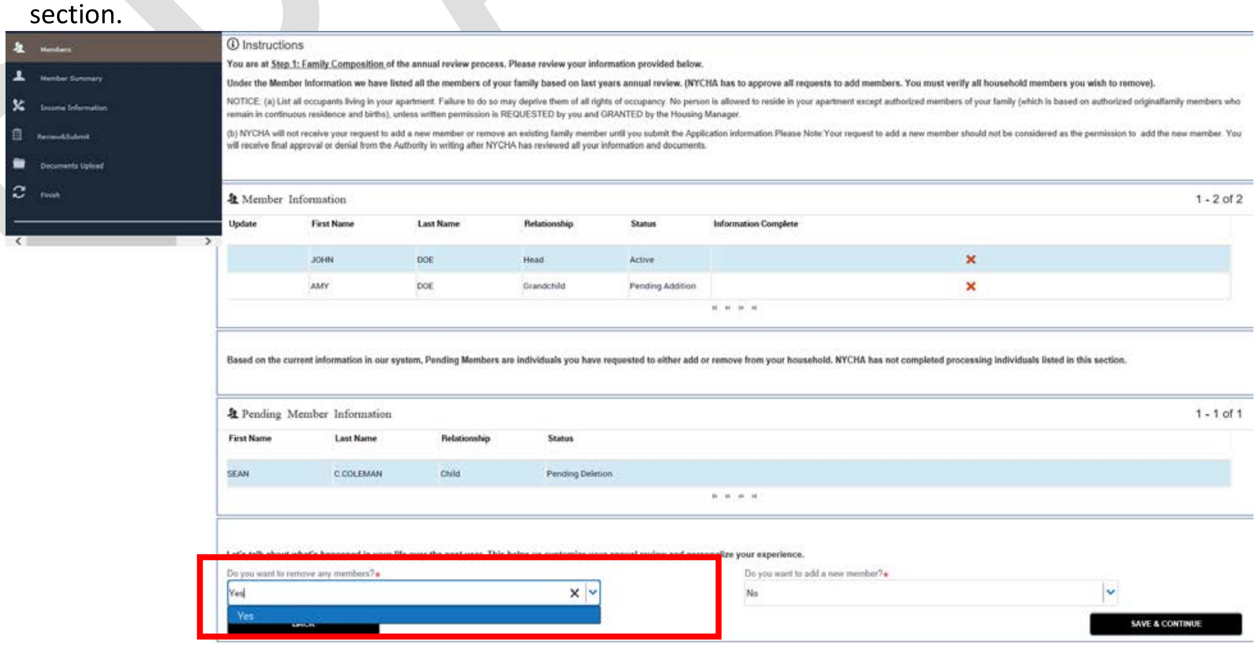
The tenant can view the form by clicking on the **To view the Third Party Terms & Conditions Please Click Here** link.



(g) Removing a Family Member (if applicable)

Tenants may request to remove member(s) from their household while completing their recertification on the portal.

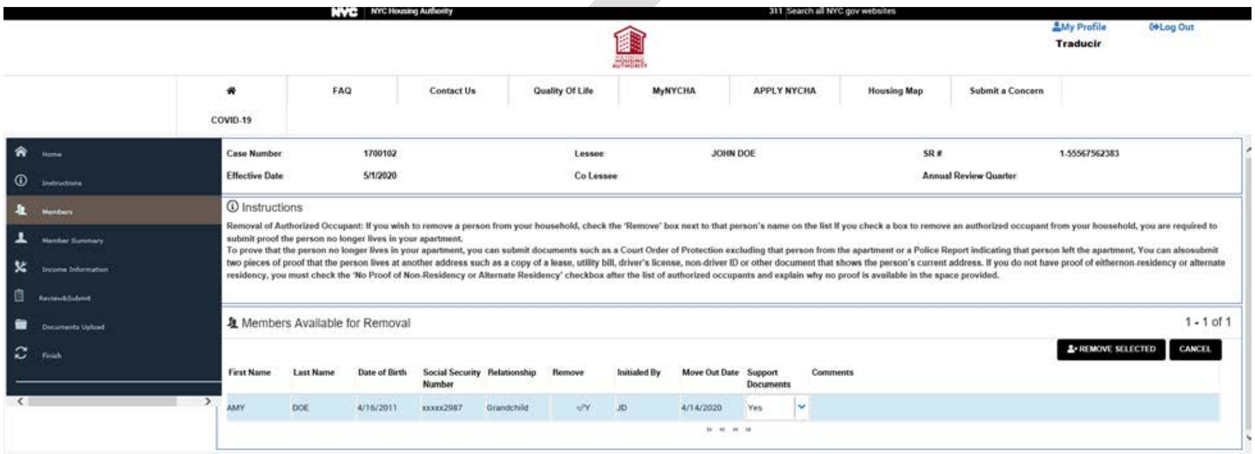
a. To remove a member from their household, the tenant should click on the **Yes** to the question below **" Do you want to remove any members"** under the **Member Information** section.



b. A new screen will open. The tenant must click on the **confirm by checking the** checkbox Remove, provide their initials in the **Initialed By, Move out Date, Documents and notes** box next to the name of the member they would like to remove, and click the **Remove Selected** button.

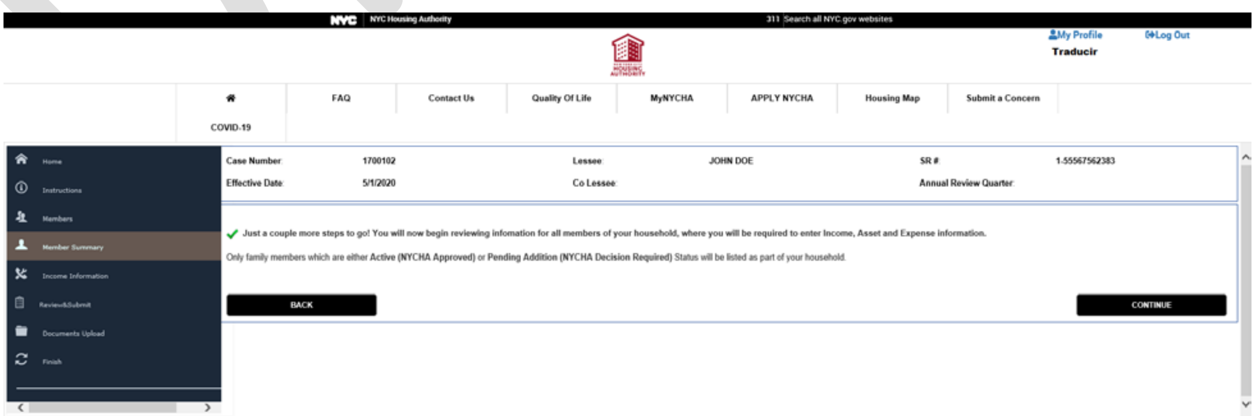
- Please note that a pop-up will appear at the top of the screen. If the tenant wishes to proceed with removing the household member, they must click **OK.** If not, they must click **Cancel.**

- The member that the tenant is requesting to remove will appear in the **Pending Member Information** section with the status **'Pending Deletion'**. To continue, the tenant must click on **Save & Continue**.



Step 2: Update member's information.

Click on **save and continue** on the Members screens. It will take you to the next shown bleow.



A) Fill out the Member Information (if there is anything changed)

- **First Name** of the Member

- **Last Name** of the Member
- **Date of Birth** of the Member

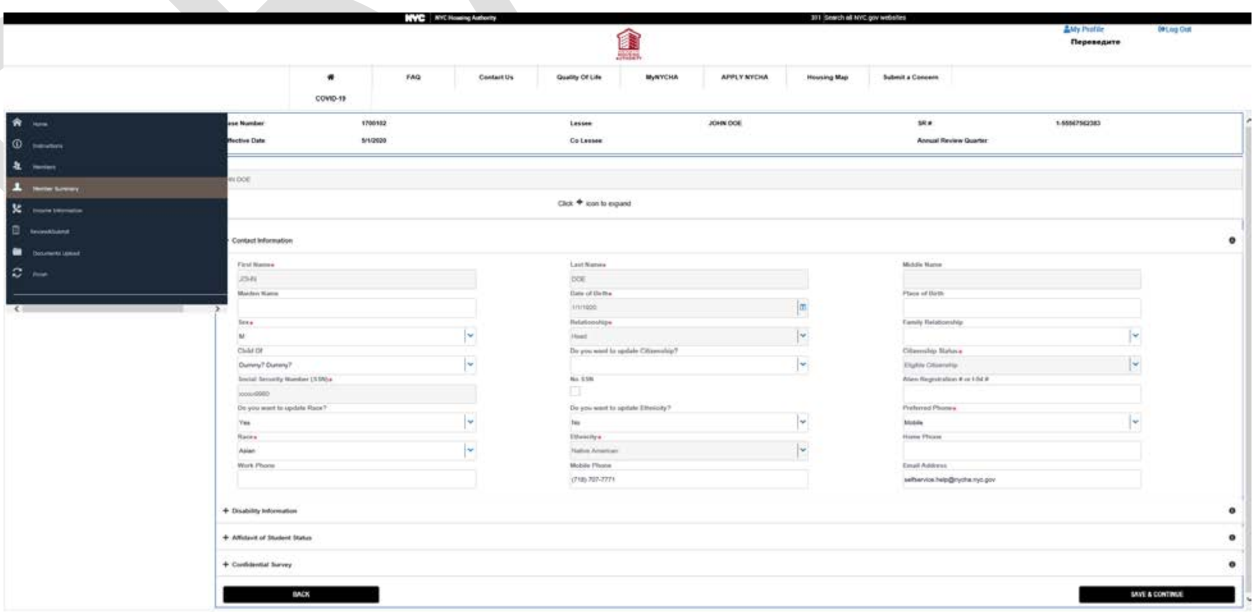
  Note: The birth date must be entered in the following format: MM/DD/YYYY. For example, 06/28/1980 or 01/05/1956
- **Sex** of the Member
- **Relationship** of the Member (to head of household).
- **Citizenship Status** of the Member.
- **Social Security Number (SSN)** of the Member.

  The social security number must be entered in the following format (**without** the dashes included): 123456789.

  NOTE: If the proposed addition does not have an SSN, the tenant must click on the **No SSN** checkbox and enter the Alien Registration # or I-94 # of the proposed addition.

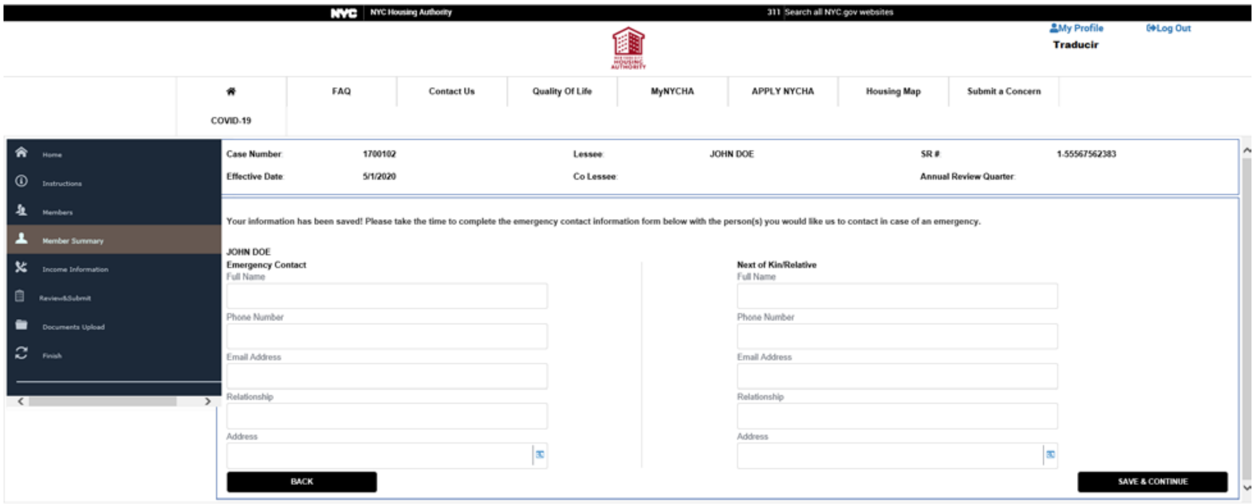
In addition to the required fields, the tenant should provide the following information regarding the new member:

- **Disability** status of the Member (Y/N)
- **Race** of the Member
- **Ethnicity** of the Member
- **Mobile, Home or Work** telephone number for the Member
- **Email Address** for the Member

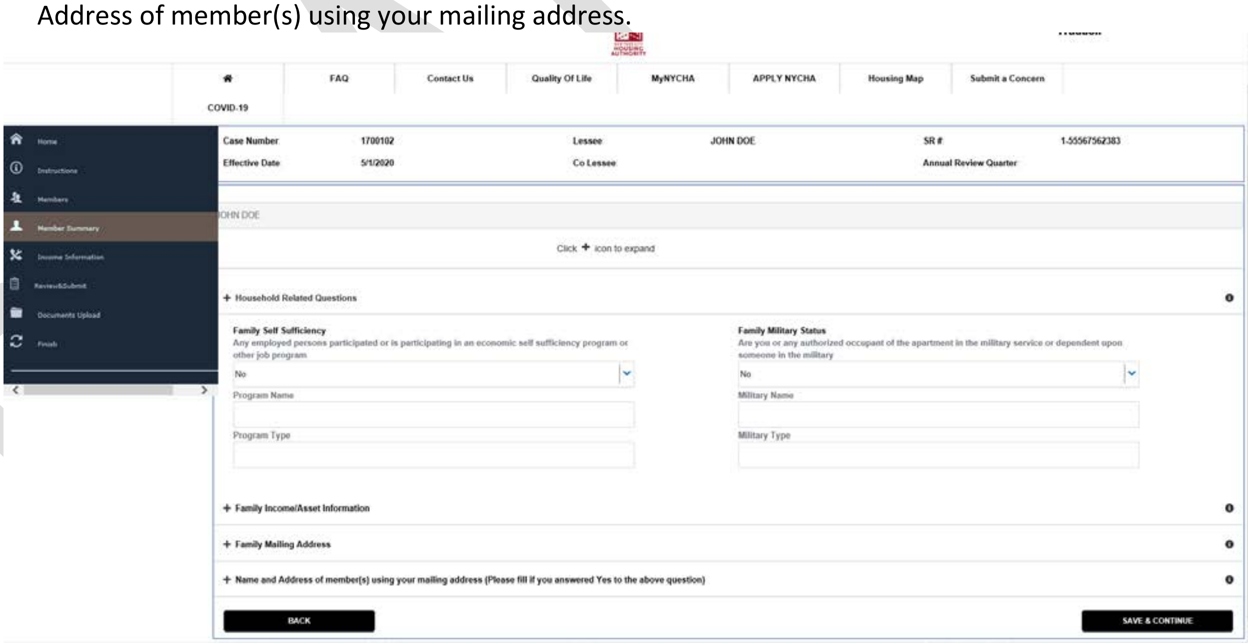


B) Provide Emergency Contact: If a tenant wants to provide emergency contact information to NYCHA, then fill out the following information.

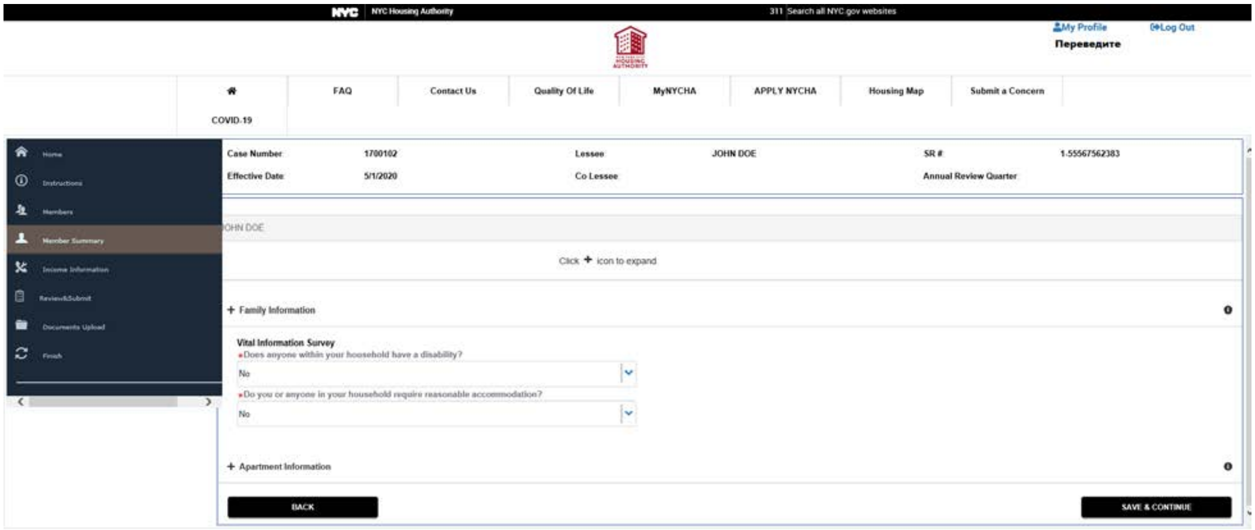
a. **First Name, Phone Number, Email Address, Relationship, Address**



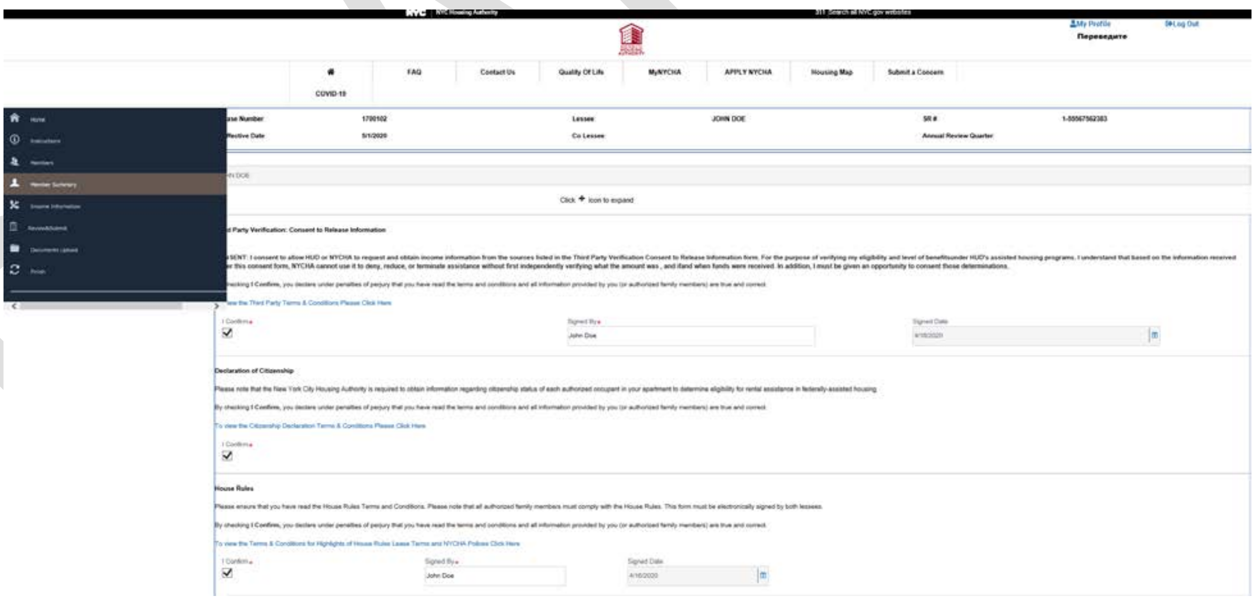
C) **Provide Related information:** Tenant can provide information regarding Household related questions, Family Income/Assest Infomration, Family Mailing Address and Name and Address of member(s) using your mailing address.

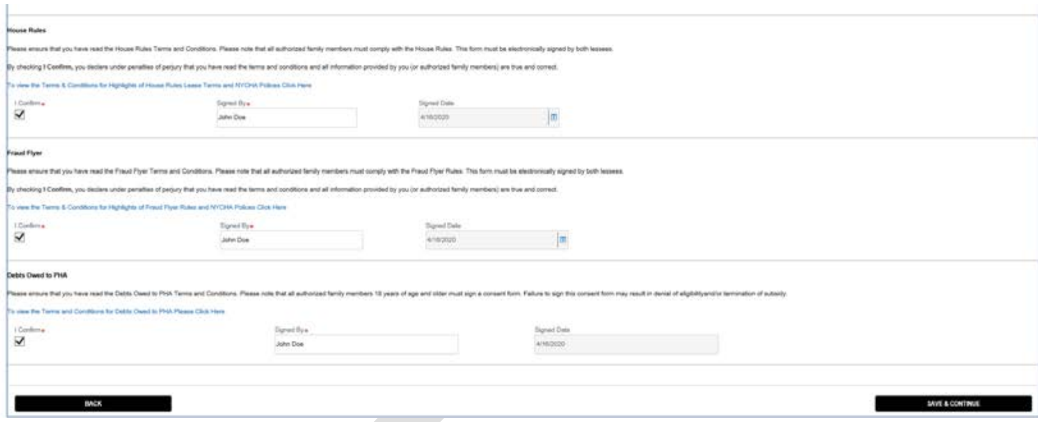


D) **Provide Related information:** Tenant can provide information regarding Family information, Apartment Information.



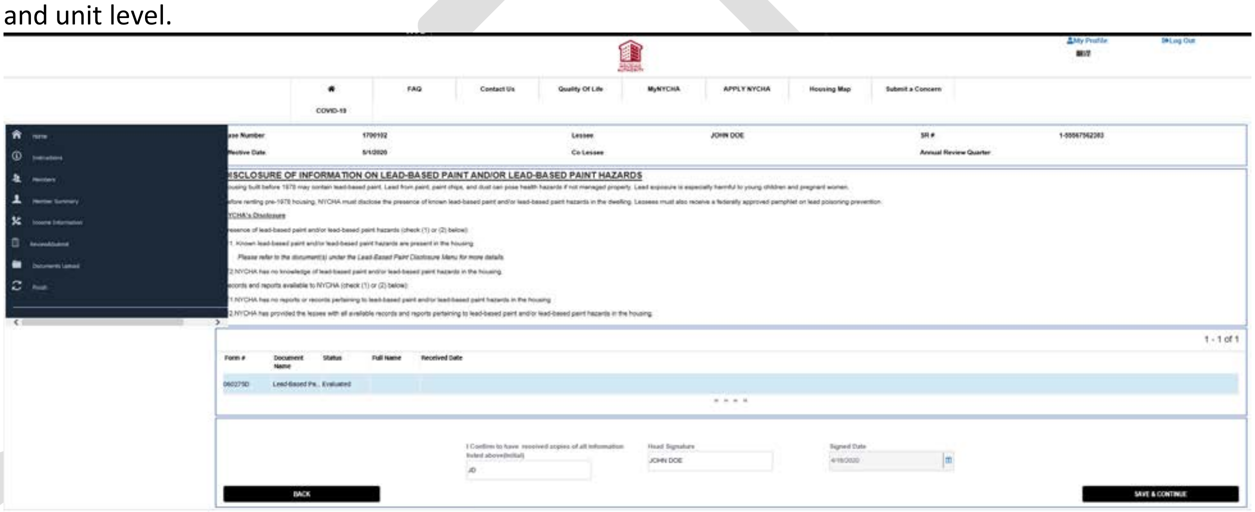
The tenant must click on the **I Confirm** checkbox to affirm all information provided is true and accurate.



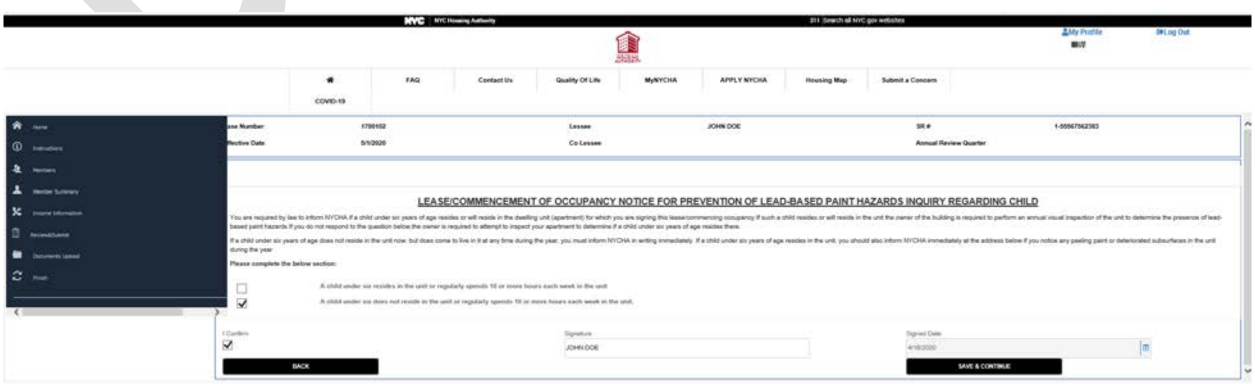


E) Disclosure of Information on lead-based paint:

Tenant will see below information, if the apartment was build before 1978. Tenant will be able to view the documents related to lead-based paint information. It could be on the building and unit level.

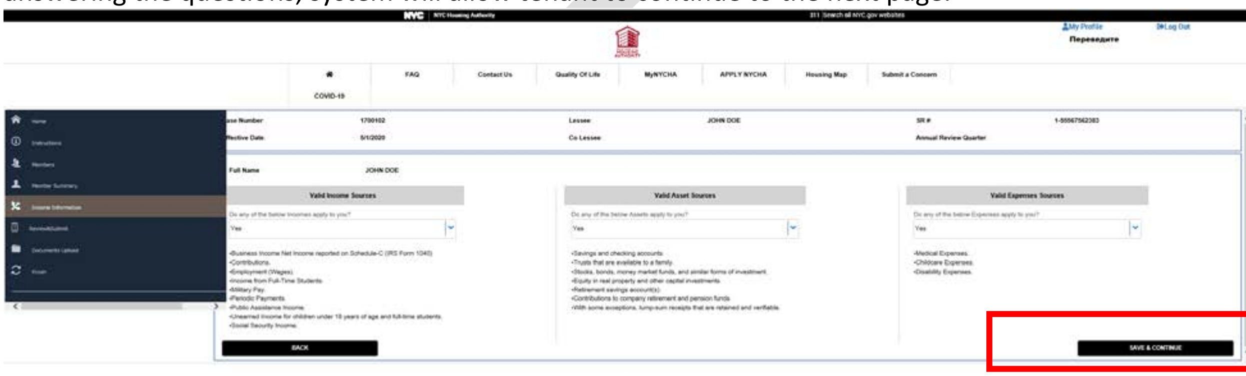


D) Lease/commencement of occupancy notice for prevention of Lead-based Paint Hazzards Inquiry regarding child. Tenant is required to provide information if there is any any child under 6 resides in the unit.

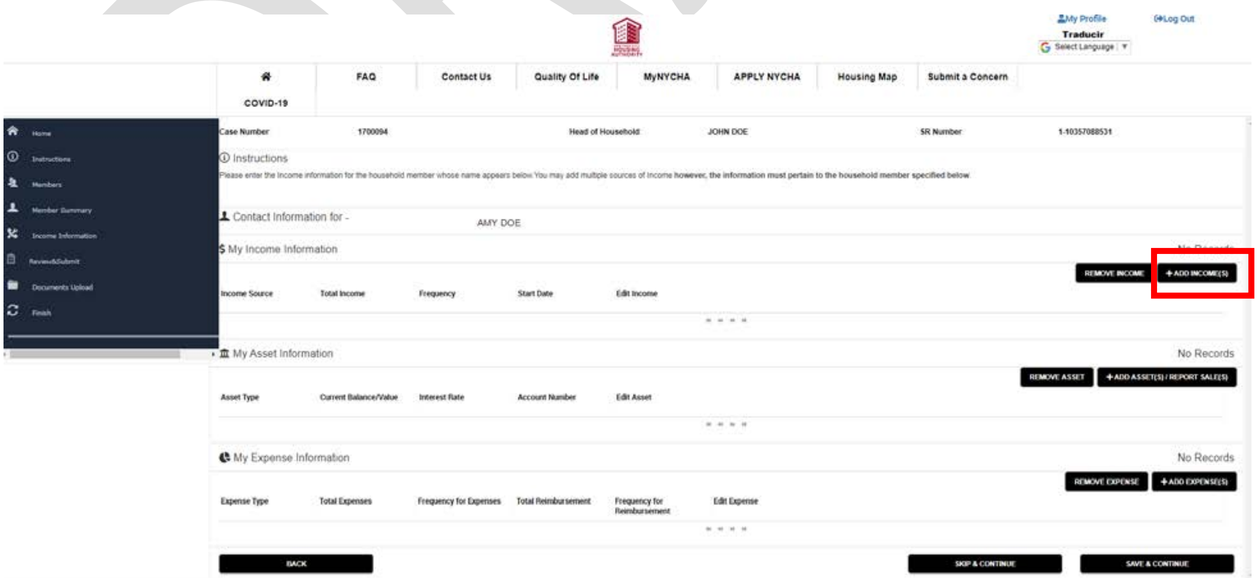


Step 3: Adding Income Information

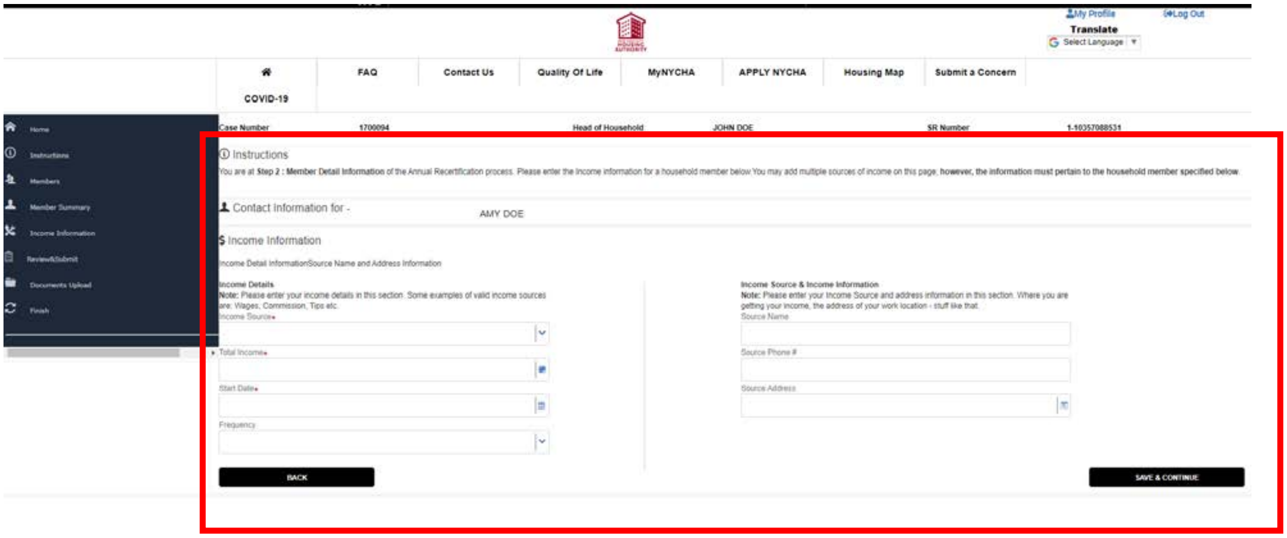
a. The tenant must provide information if any Income/Asset/Expense apply to them. Upon answering the questions, system will allow tenant to continue to the next page.



The tenant must click on the **Add Income** button to begin. The tenant can add multiple income sources for themselves, family members, or members they would like to add to the household



Tenants are required to report all sources if income for the household to NYCHA. The following pop-up will appear if the tenant reports that a household member has income, but does not provide information for the income source. If the tenant would like to add an income source, they should click Cancel and then click the Add Income button. If there is no income, the tenant should click OK.



The following information is required:

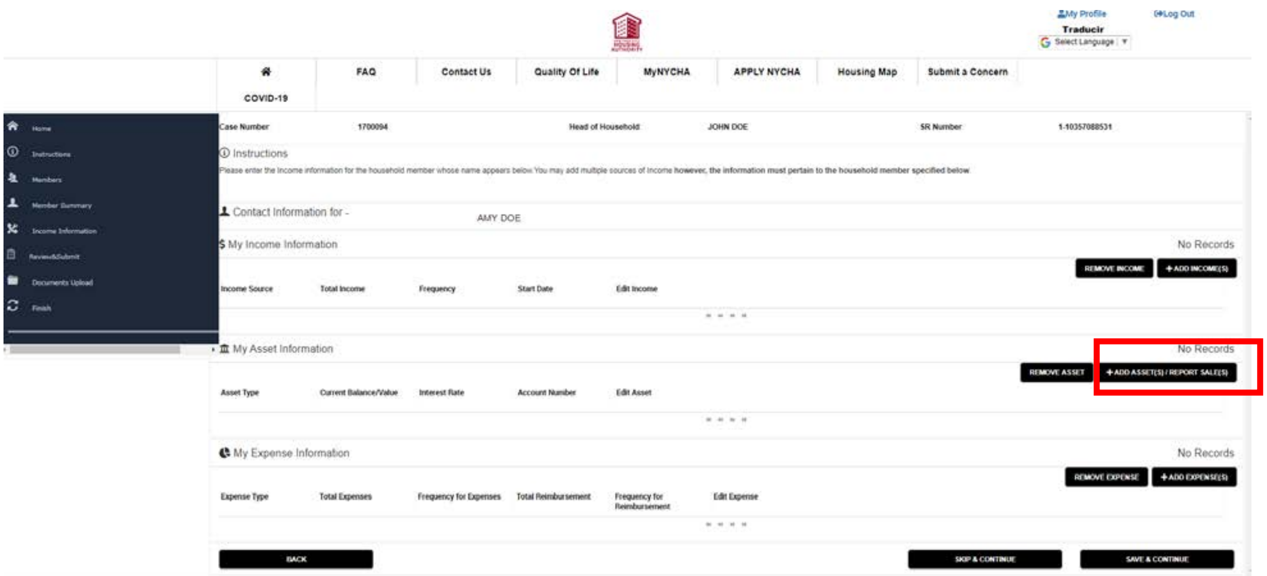
- **Income Source** – The tenant must select their source of income from the dropdown menu.
- **Start Date** of the income. The date must be entered in the following format: MM/DD/YYY. For example, 06/28/1980 or 01/05/1956.
- **Total Income** received
- **Frequency –** The tenant must make a selection from the dropdown menu

The tenant must also provide the name, full address and telephone number of the source of income. Once complete, the tenant must click **Save & Continue**.

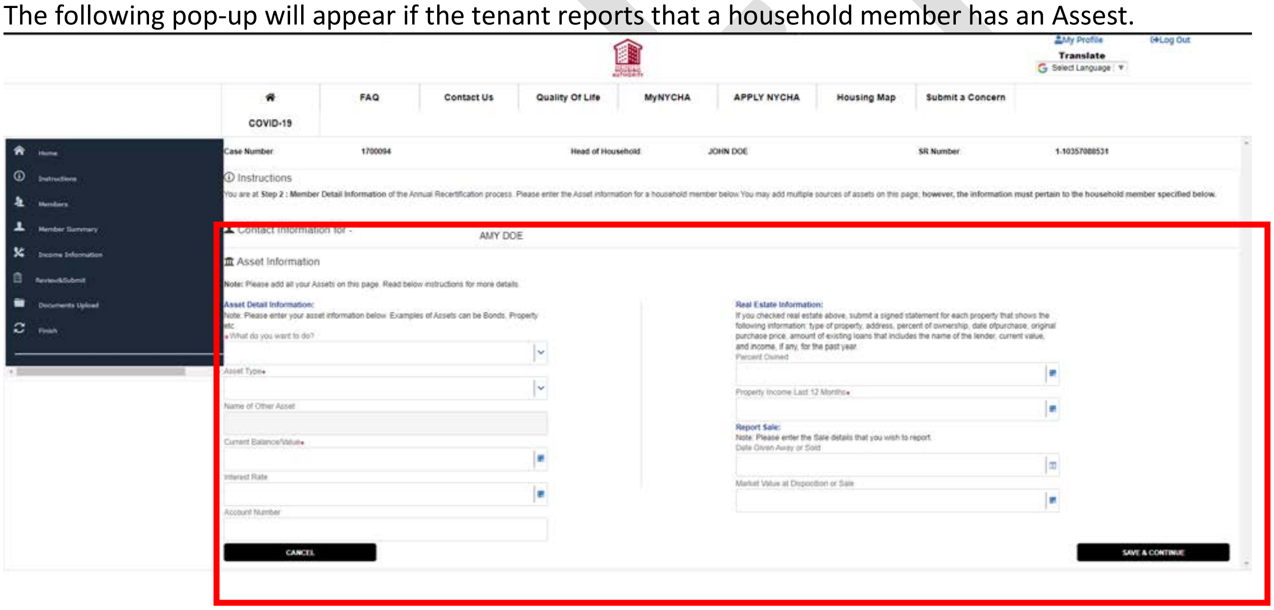
NOTE: All income information entered will appear under the **Income Information** section.

Step 4: Adding Asset Information

a. The tenant must click on the **Add Asset/Report Sales** button to begin. The tenant can add multiple assets for themselves, family members, or members they would like to add to the household.



The following pop-up will appear if the tenant reports that a household member has an Assest.



The following information is required:

- **What do you want to do?** – The tenant can either select 'Add an Asset' or 'Report a Sale':
- **Asset Type** – The tenant must select their asset from the dropdown menu.
- **Name of other Assest** of the tenant
- **Current Balance/Value** of the asset type
- **Interest Rate** of the asset type
- **Account Number (if any)**

If tenant selected 'Real Estate' as the asset type, they should provide the following information under the **Real Estate Information** section:

- **Property Owned**
- **Property Income Last 12 Months**

If the tenant has sold an asset, they should provide the following information:

- **Date Given Away or Sold**. The date must be entered in the following format: MM/DD/YYYY. For example, 06/28/1980 or 01/05/1956
- **Market Value at Disposition of Sale**

Once complete, the tenant must click **Save & Continue.**

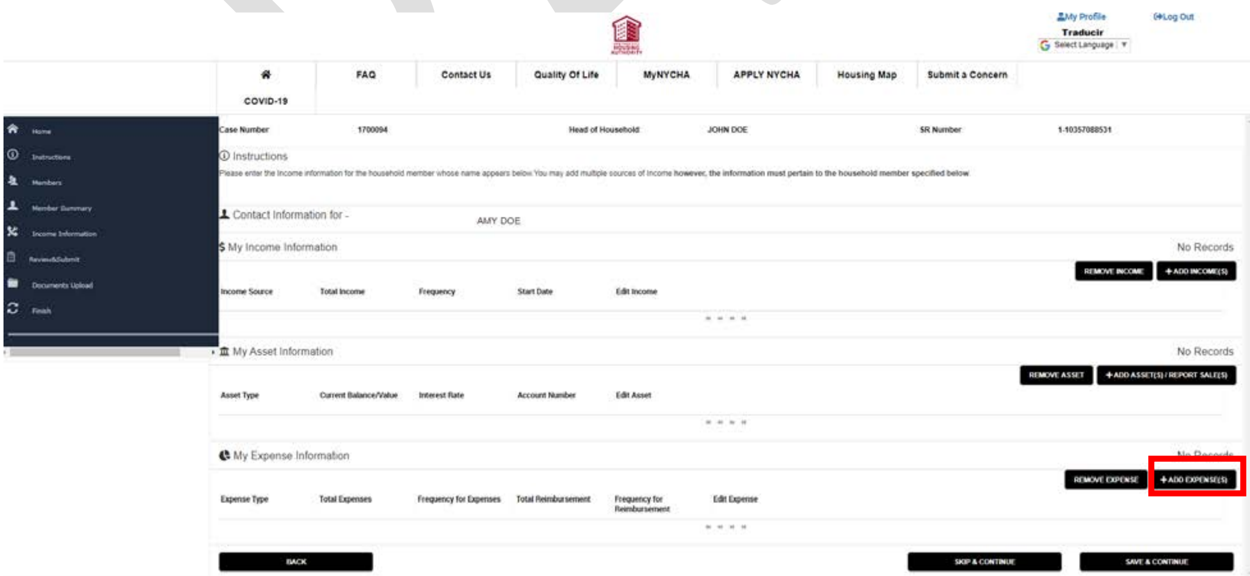
NOTE: All asset information entered will appear under the **Asset Information** section.

Step 5: Adding Expense Information

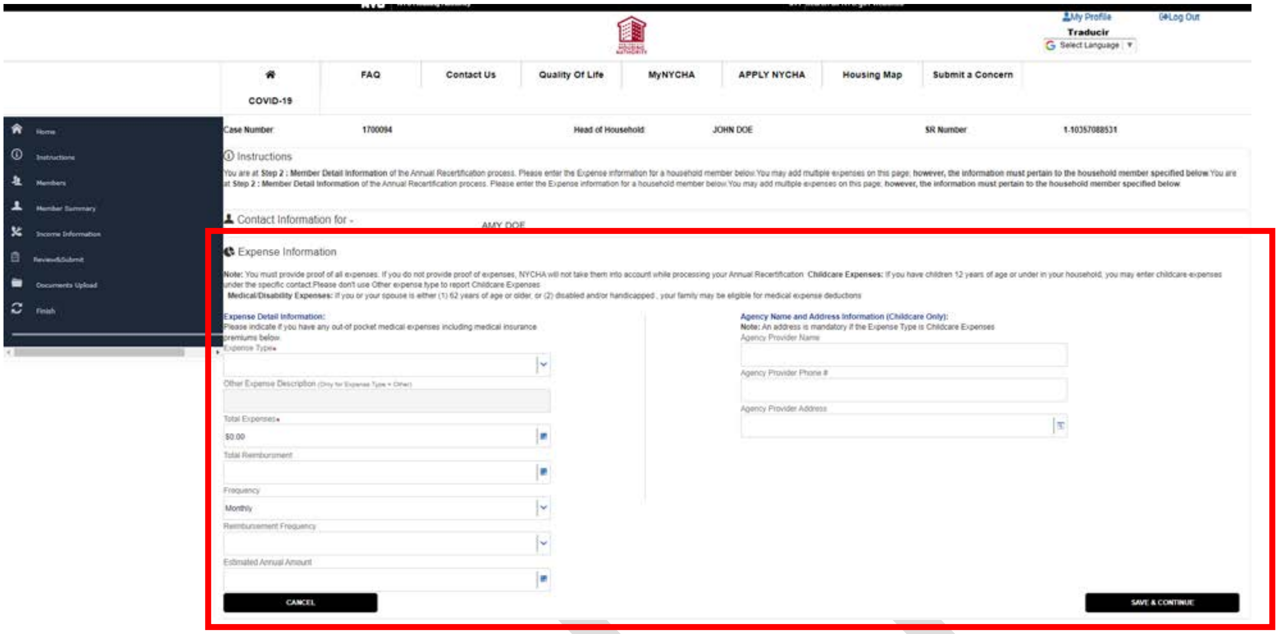
a. The tenant must click on the **Add Expense** button to begin. The tenant can add multiple childcare and/or medical or disability expenses for themselves, family members, or members they would like to add to the household.

NOTE 1: A family may be eligible for medical or disability expenses if the head of household or their spouse is either (1) 62 years of age or older; or (2) disabled and/or handicapped.

NOTE 2: The tenant may submit childcare expenses for each child 12 years of age or younger in the household. Please note that each childcare expense must be entered under the contact of the child for whom the expense is for.



The following window will open to allow the tenant to add their expenses.



The following information is required:

- **Expense Type** – The tenant must select their expense type from the drop-down menu
- **Other Expenses Description** -
- **Total Expense**-The must add total expenses
- **Frequency** – The tenant must make a selection from the dropdown menu
- **Estimated Annual Amount** of the expense

If applicable, the tenant must also enter the following information:

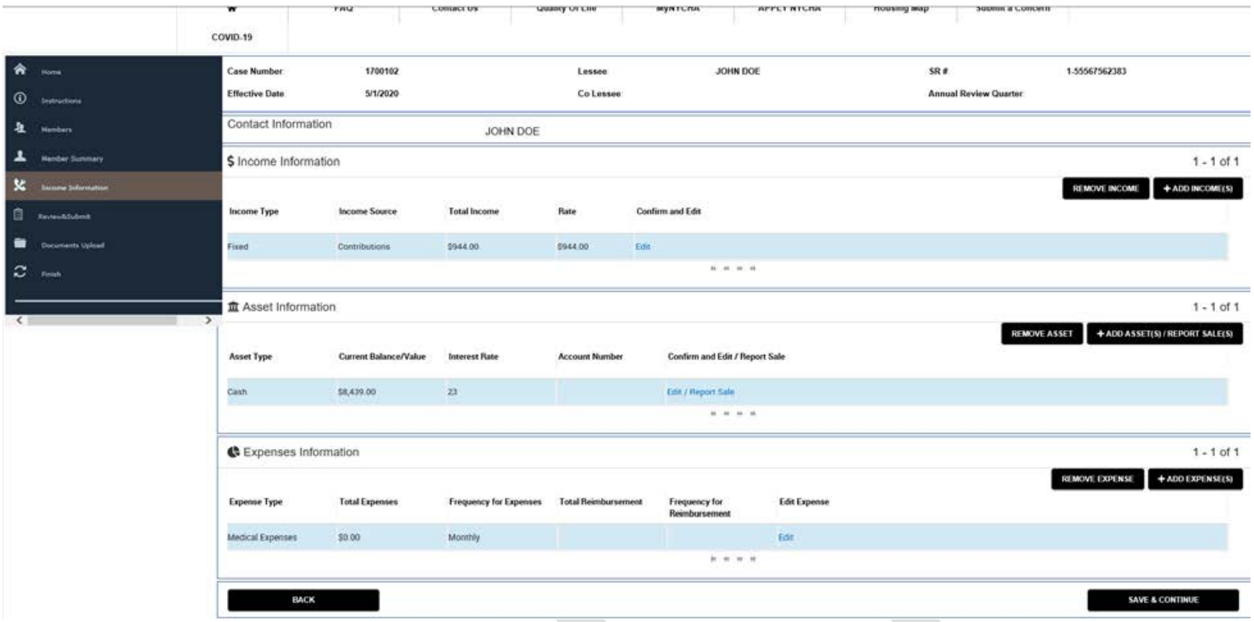
- **Reimbursement Frequency** – The tenant must make a selection from the dropdown menu

If the tenant selected 'Childcare Expense' as the expense type, they should fill out the **Agency Name and Address Information (Childcare Only)** section. The tenant should provide the following information:

- Agency Provider Name
- Agency/Provider Address
- Agency/Provider Phone #

Once complete, the tenant must click **Save & Continue**.

NOTE: All expense information entered will appear under the **Expenses Information** section.

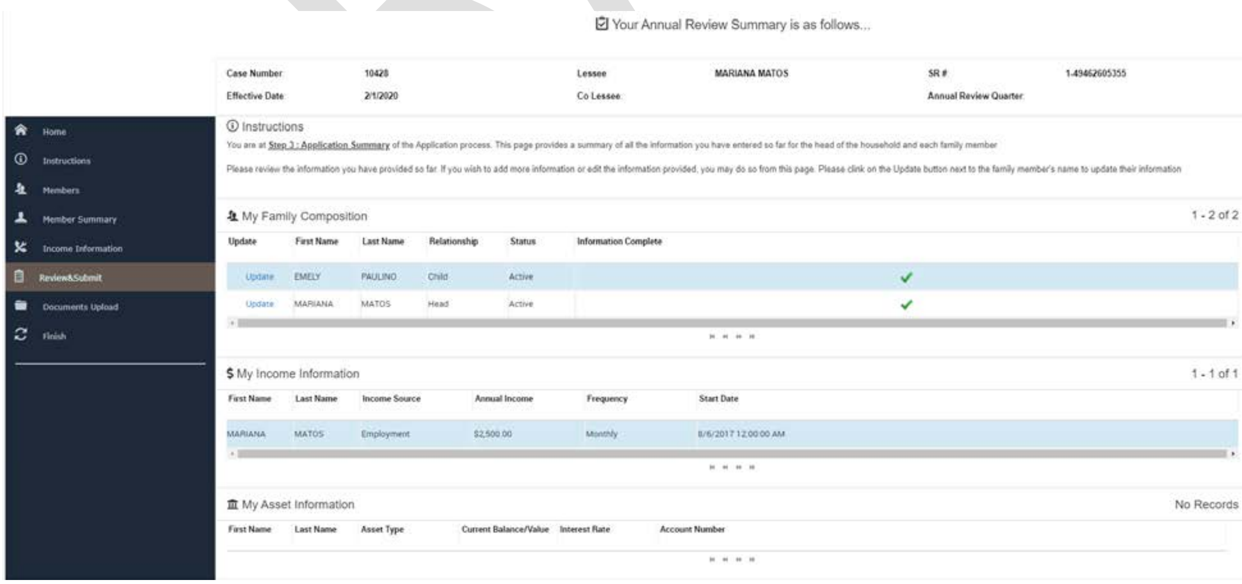


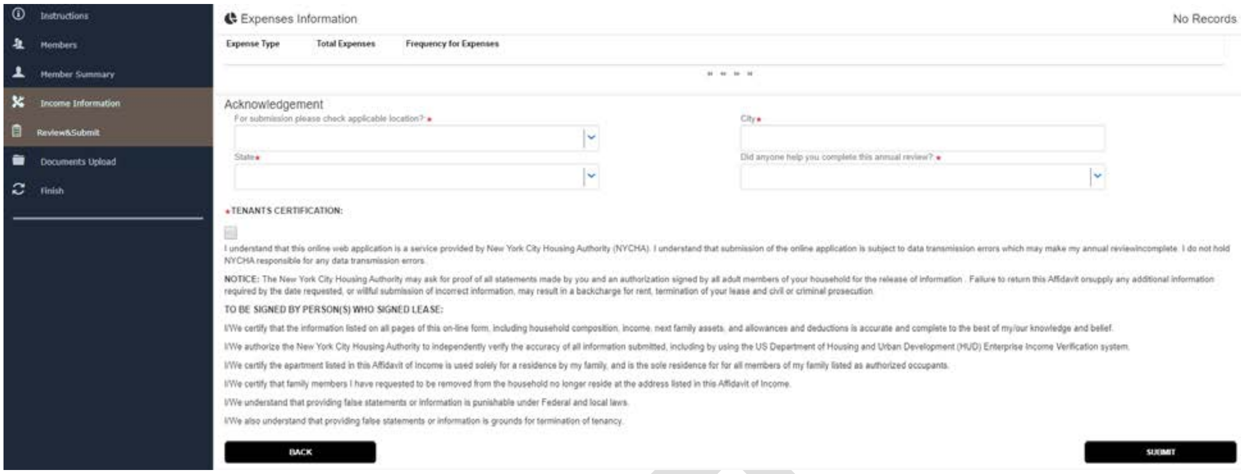
Step 6: Review and Submit:

The **Review and Submit** provides a summary of all of the income, asset, and expense information entered for the head of household, each family member, and all requested household additions.

This page also allows the tenant to update any information for family members by clicking on the **Update** link next to the name of the member.

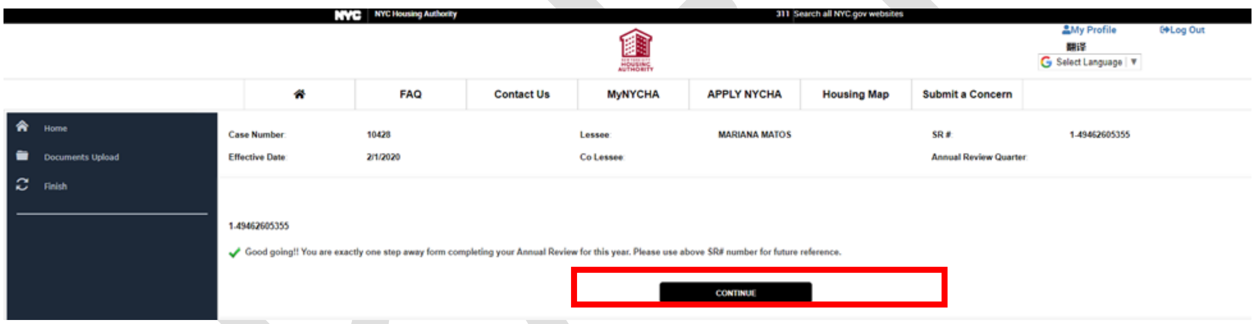
If the information is correct, the tenant must select the **Acknowledgement** checkbox and click **Submit** to submit their Annual Recertification. Please note that once the tenant submits their Annual Recertification, they cannot make any changes to their information.



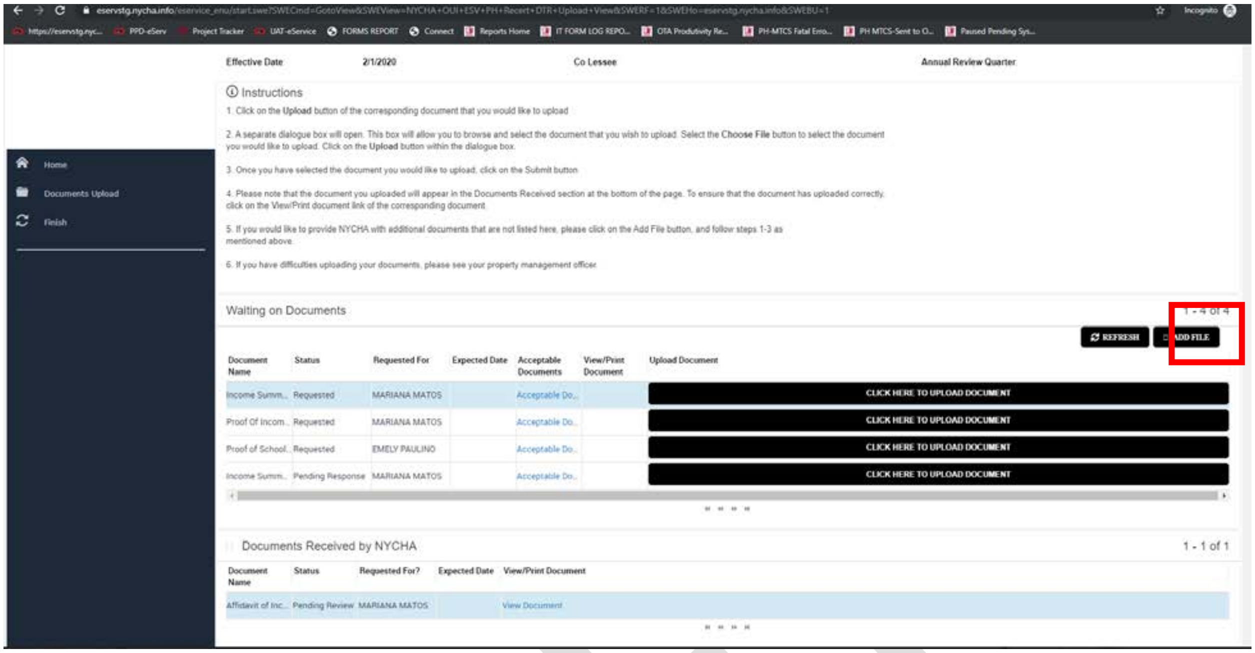


Step 7:Review the Document(s) Summary:

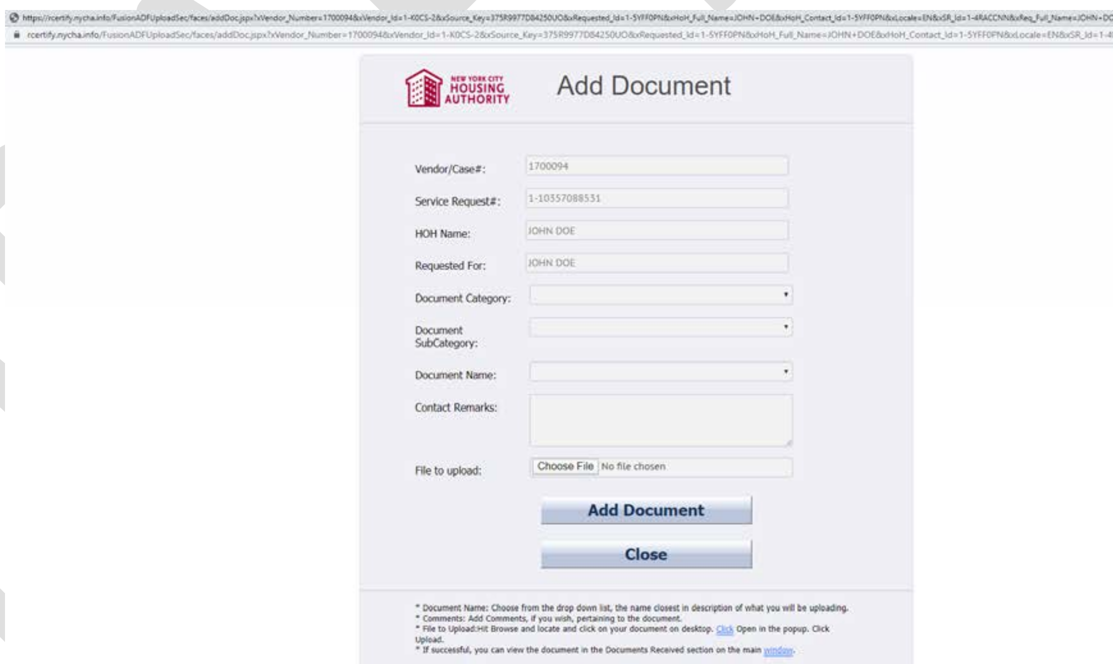
Click on the Continue to document upload (s)



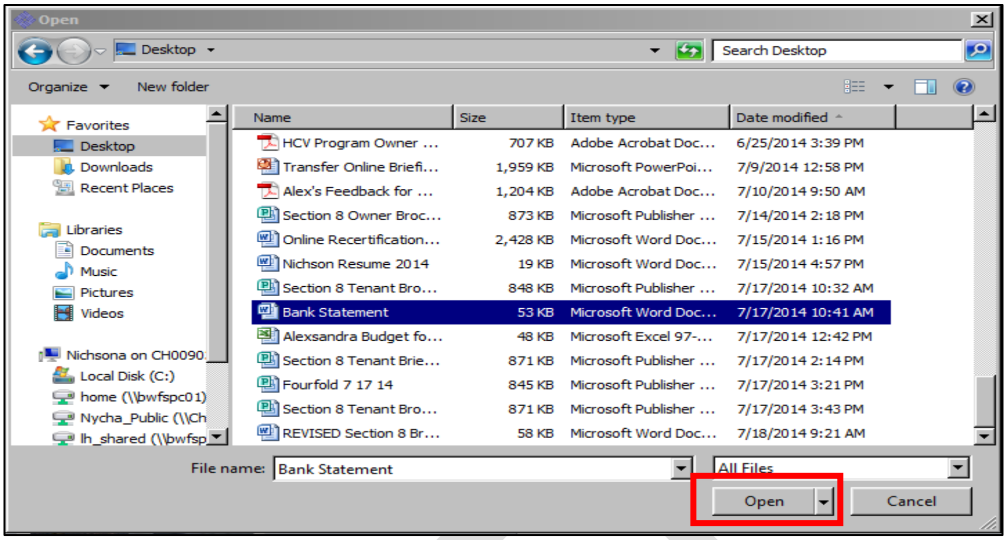
The Document(s) Summary provides a list of supporting documents that must be submitted with the recertification based on the information provided by the tenant. If there are any pending documents that NYCHA has requested the tenant as a part of recertification process then tenant needs to provide doucments.



A separate dialogue box will open to add documents.



By clicking document category, the box will display a list of acceptable documents that can be submitted. Document Sub Category (dropdown), Document name, Contact Remarks (tenant can add any additional information about the document), then click on the choose file button, thenTA separate dialogue box will open. The tenant must select the document they would like to upload. Once a document has been selected, tenant must click **Open**.



a. The file the tenant uploaded will appear next to the **Choose File** button. The tenant should then click **Upload**.

NOTE: A separate dialogue box will open informing the tenant that the document was successfully uploaded. The tenant must click **OK** in the Dialogue box, and then click **Close** to continue.

b. All documents uploaded will appear in the **Documents Received** section at the bottom of the page. The tenant should always click on the **View/Print Doc** link of the corresponding document to ensure the upload was successful.

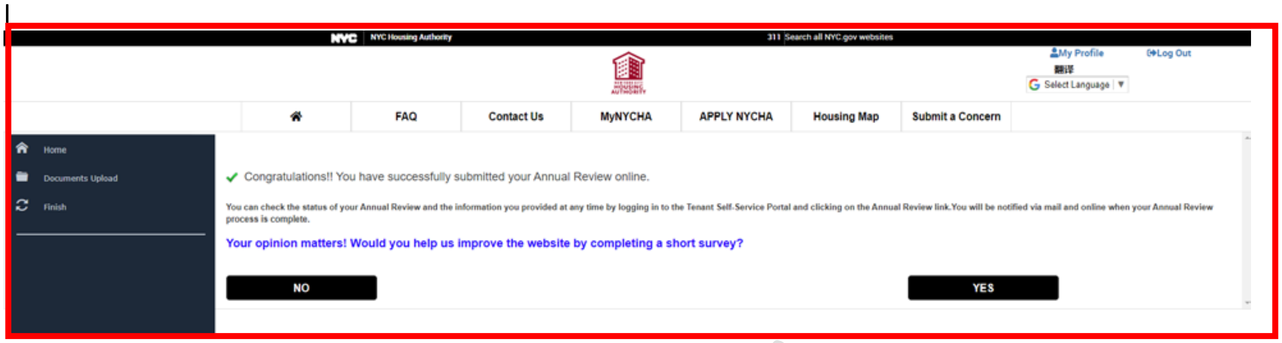

Documents Received by NYCHA

1 - 4 of 4

Document Name	Status	Requested For?	Expected Date	View/Print Document
Affidavit of Income - Main Online	Pending Review	ABRAHAM FROMOWITZ		View Document
Affidavit of Income for Active Family Members...	Pending Review	MIRUI FROMOWITZ		View Document
Third Party Verification Consent to Release On...	Pending Review	MIRUI FROMOWITZ	11/5/2016	View Document
Debts Owed to Public Housing Agencies and T...	Pending Review	MIRUI FROMOWITZ		View Document

NOTE 1: If the tenant would like to submit additional documents not listed under the **Waiting on Documents** section, they can click on the **Add Additional Documents** link.

NOTE 2: If the tenant has any questions related to uploading documents, they can click on a link to the **Frequently Asked Questions (FAQs)** or watch the **'How to Upload Document'** video.
After uploading the document, tenant can click on the continue button.



NOTE 2: If the tenant has any questions related to the use of the portal or about the recertification process, they can navigate to the Frequently Asked Questions (FAQs) section of the website by clicking on the **View All FAQs** link or typing a keyword or phrase into the **Search Frequently Asked Questions (FAQs)** free form text box and clicking **Go**.

—End of Online Recertification Process—