

# **Public Housing**

## Interim Recertification

Manual



4/25/2020

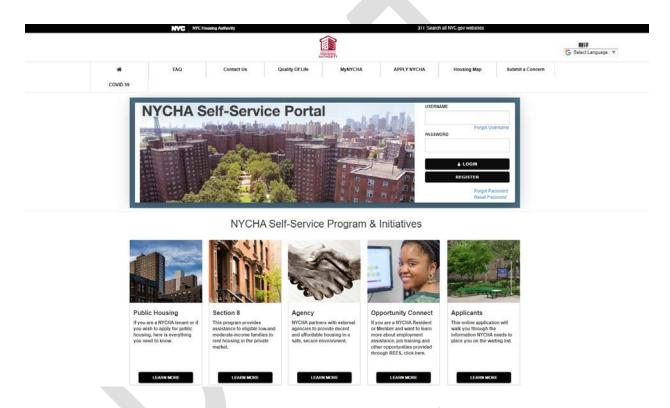
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#### INSTRUCTIONS FOR COMPLETING INTERIM RECERTIFICATION ONLINE

#### **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:



<u>Enter Credentials:</u> 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.

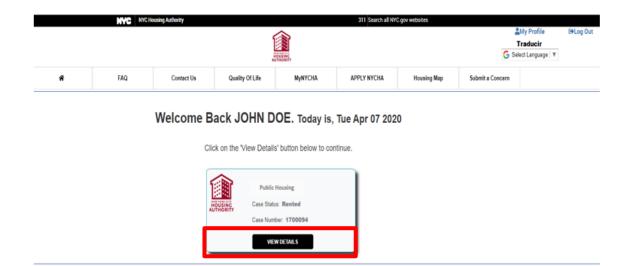
Enter

USERNAME: JOHNDOE123

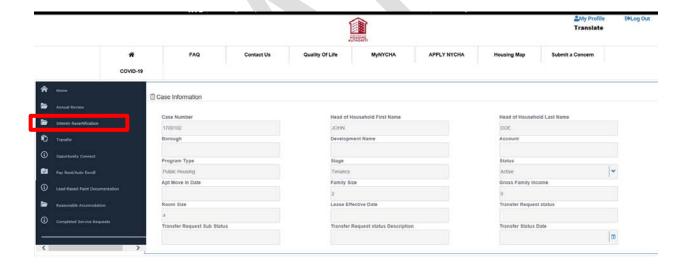
O PASSWORD: \*\*\*\*\*\*\*

**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.

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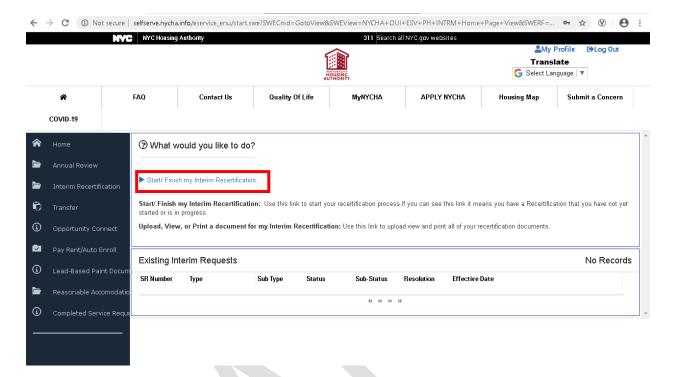


**Interim Recertication**: The tenant will be taken to a page that displays their detailed Case information. The tenant should click **Interim recertification Tab** on the left pane as shown below.



#### **Initiate Interim Recertification:**

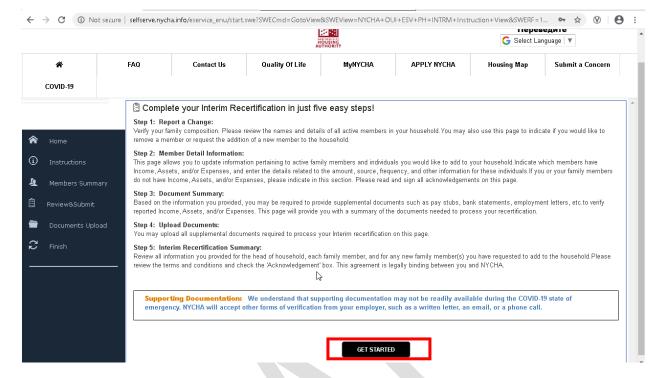
The tenant should click on the <u>Start/Resume</u> my Interim Recertification link to begin the recertification process.



#### **Interim Recertification Instructions:**

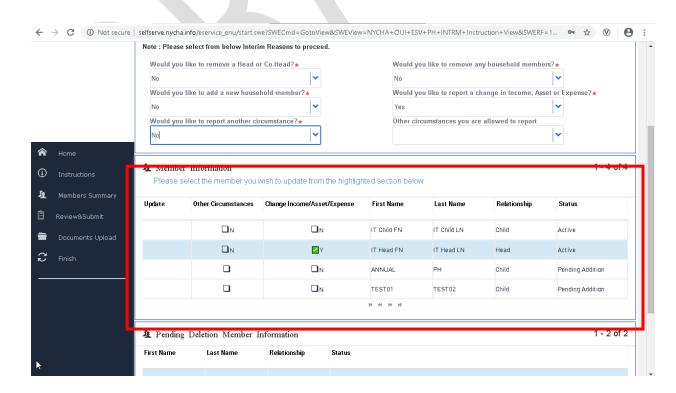
Once the tenant clicks on the **Start/Resume my Interim Recertification** link, they will be taken to the Instruction landing page. This page provides instructions for completing their Interim Recertification on the portal.

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



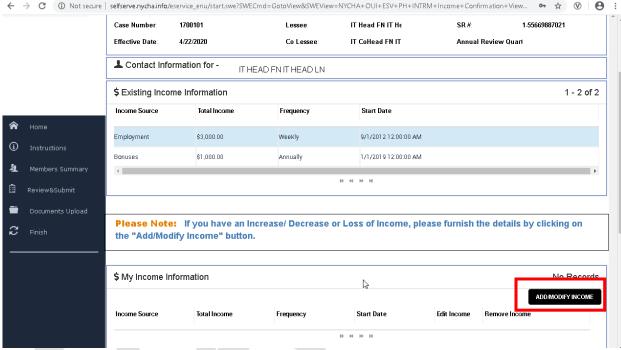
#### **Step 1: Verify Family Composition:**

This page displays the most current household information available in Siebel. All Active Household Members currently residing in the household are listed in the <a href="Member Information">Member Information</a> section. The tenant must review the information presented in this section. Tenant must select from below Interim reason to proceed as given below.

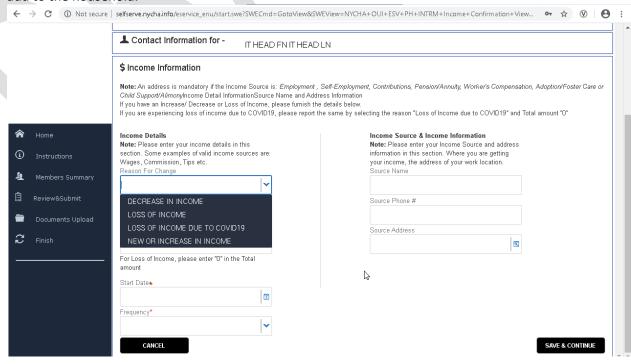


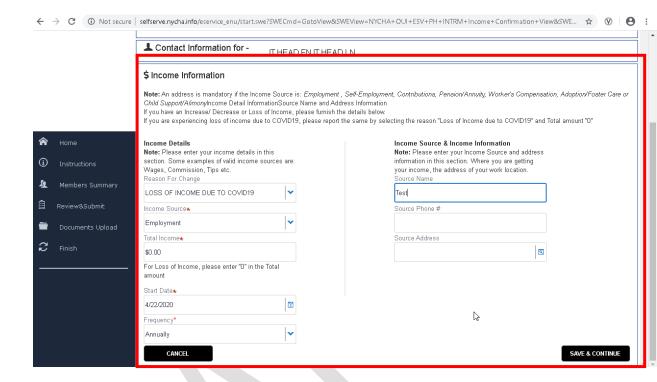
#### **Step 3: If Change in Income Information (Applies):**

- a. The tenant must provide information if there any change to Income/Asset/Expense. Upon answering the questions, system will allow tenant to continue to the next page.
- b. Click on Add/Modify Income.



The tenant must click on the **Add/Modify 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 <u>Cancel</u> and then click the Add Income button. If there is no income, the tenant should click <u>OK</u>.

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.

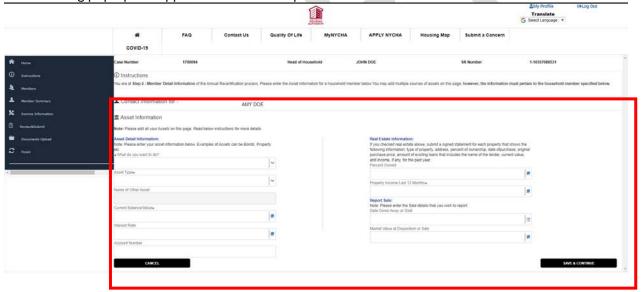
**NOTE:** All income information entered will appear under the **Income Information** section.

#### **Step 4: If change in Asset Information (Applies):**

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.

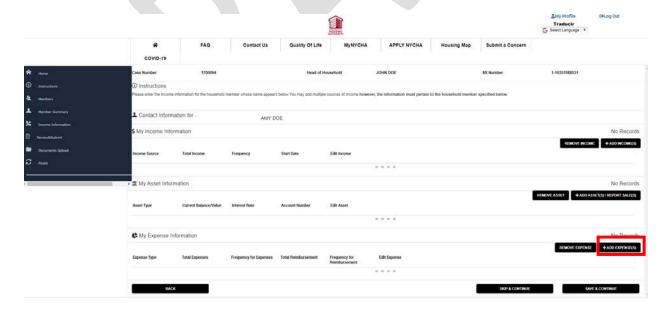
**NOTE:** All asset information entered will appear under the **Asset Information** section.

#### **Step 5: If change in Expense Information (Applies):**

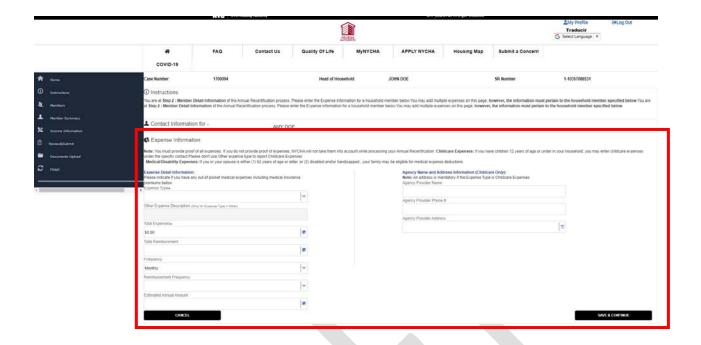
a. The tenant must click on the Add Expense button to begin. The tenant can add multiple childcare and/or medical or disability expenses for themselves, family members, or members they would like to add to the household.

**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:

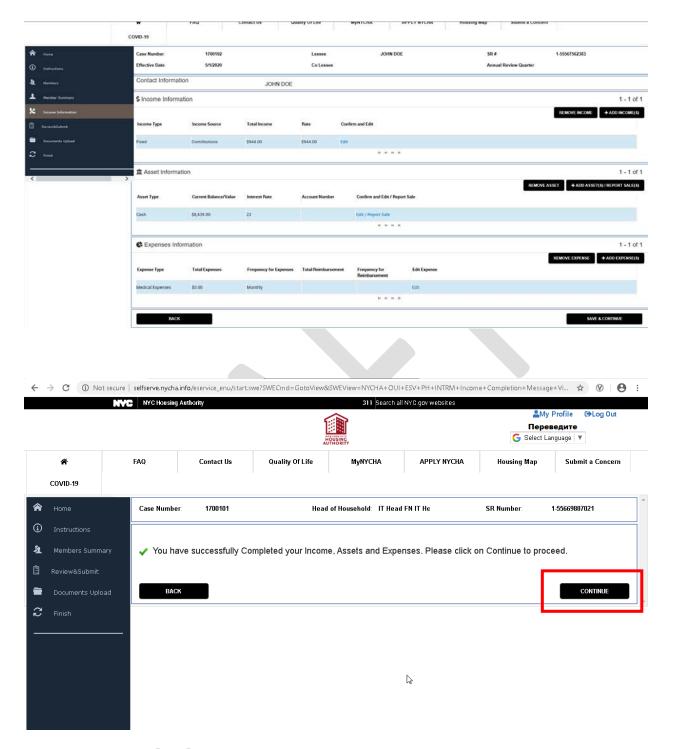
 Reimbursement Frequency – The tenant must make a selection from the dropdown menu

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.

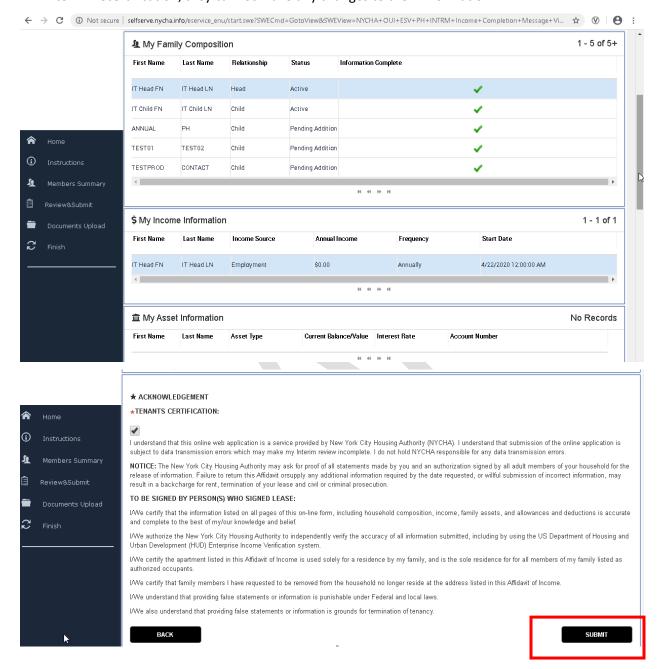


### **Step 6: Review and Submit:**

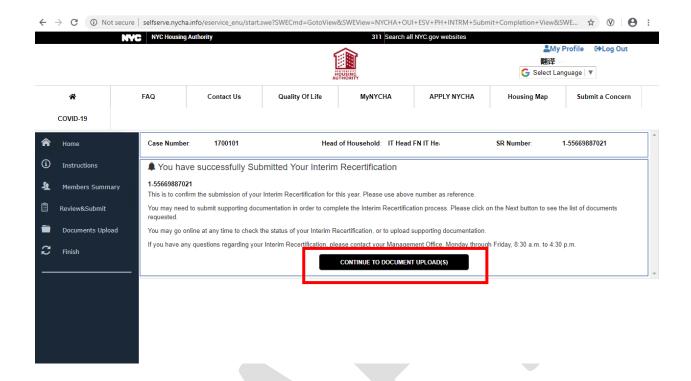
The **Review and Submit** provides a summary of all of the income, asset, and expense information entered for the head of household, each family member, and all requested household additions.

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 Interim Recertification. Please note that once the tenant submits their Interim Recertification, they cannot make any changes to their information.



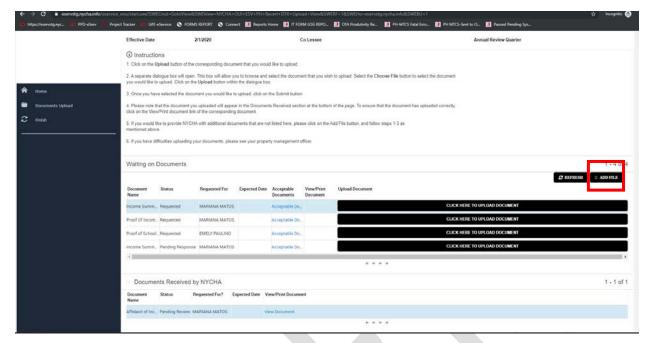
**Upon Submission, Tenant will receive confirmation as below:** 



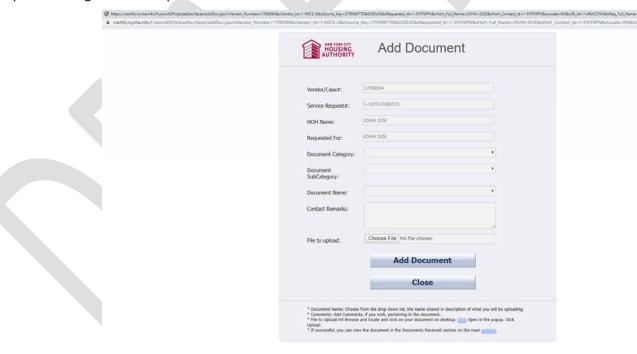
## **Step 7:Review the Document(s) Summary:**

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.

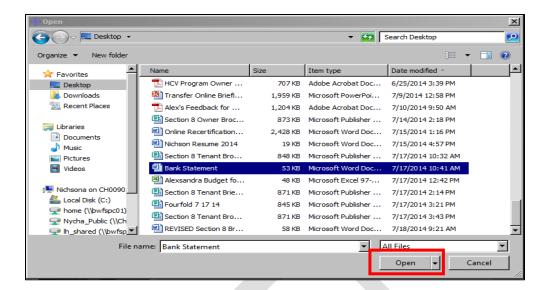
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A separate dialogue box will open to add documents.



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.

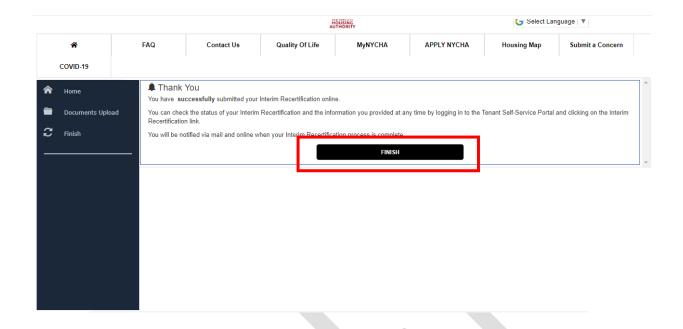
b. All documents uploaded will appear in the Documents Received section at the bottom of the page. The tenant should always click on the View/Print Doc link of the corresponding document to ensure the upload was successful.



Once all documents are uploaded

**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**.

