



## **PROGRAM BULLETIN**

**To:** Owners and Managers of Multifamily Developments  
**From:** Michael DiChiaro, Director of Leased Housing and Rental Services  
**Date:** July 14, 2023  
**Subject:** Procorem System Access and Requirements for Owners and Management Agents with Compliance and/or Financial Reporting Obligations



### **Bulletin #2023-03**

RIHousing has partnered with ProLink Solutions in implementing a new software program, Procorem, for the purpose of communication with and monitoring of its multifamily portfolio. Owners and Managers of Multifamily Developments that received direct financing or funding administered by RIHousing, including but not limited to Low Income Housing Tax Credits, HOME, NOP, Preservation, Work Force Housing, etc. will be required to submit tenant certifications, financial reports, inspection responses, and more through Procorem.

### **PROCOREM USERS**

All users of this platform will be required to submit a Procorem User Authorization form prior to admission into the workcenter(s) designated to each property. Due to the potential for exposure to PII and other sensitive information in Procorem, each user must be approved to gain access from a representative of the owner/agent with sufficient authority to execute documents on behalf of his or her organization. RIHousing requires at least one employee from both the ownership and management agent of each site with LIHTC, ancillary funding or RIHousing financing to register in Procorem.

Procorem users will be assigned only to the workcenter(s) deemed necessary on the Procorem User Authorization form. The available categories include but are not limited to Asset Management, Compliance, Development and Design & Construction. RIHousing reserves discretion to disallow access to certain workcenters on a need-to-know basis. One example would be a property manager requesting and being denied access to a Development workcenter.

Users will be required to certify annually; notification of the recertification event will be distributed through Procorem. Failure to respond to a user recertification shall result in the suspension of that user's access to the system. Access will be restored only upon receipt of the required recertification document.



RIHousing requires that requests to modify or terminate users' access rights are originated by authorized representatives of the owners and management agents. Upon termination or reassignment of job responsibilities of any owner or management agent personnel with access to Procorem, a representative of the respective organization must submit an updated Procorem User Authorization form to RIHousing terminating the user's access to Procorem within two business days of the change.

### **PROCOREM WORKCENTERS**

Procorem users will be assigned to workcenters as designated on completed Procorem User Authorization forms at the discretion of RIHousing. Each workcenter is established to provide a user-friendly and site-specific environment to upload tenant events, submit documents and other reports, provide tenant files for file reviews, and more.

Each user will be assigned a role within their assigned Procorem workcenter(s), which will allow system-generated notifications pertaining to certain tasks including but not limited to recertification of Procorem users, warning of impending deadlines, upcoming inspection dates, reminders, and correspondence.

Within each workcenter, Procorem users will have access to all Files, Posts, Tasks, and Calendar events on the same level as RIHousing employees, allowing for unprecedented transparency with regard to the underwriting, asset management, compliance, and/or design and construction of the development. All users will be capable of uploading and downloading files, creating posts to correspond with RIHousing, and completing tasks.

Procorem is designed to keep its users up to date in real time; all activity within a workcenter will be immediately communicated with all collaborators unless a user changes their preference within that workcenter. Preferences may be applied to individual workcenters to receive immediate e-mails, daily digest e-mails, or both.

The focus of this Program Bulletin is to bring our partners with existing compliance reporting obligations awareness of new requirements in compliance and financial reporting. A supplementary Program Bulletin will be circulated later in 2023 aimed toward informing owners, developers, syndicators, etc. of the details of the Development workcenters.

### **TENANT EVENTS**

Procorem is replacing WTC (formerly WCMS) as the vessel that captures tenant certification data, which will be referred to as tenant events going forward. Tenant events must be imported to Procorem by the 10<sup>th</sup> of each month. Sites capable of generating an XML file for an upload of tenant events must upload a year-to-date XML file monthly. Manual entry of tenant events on a monthly basis is required for all sites whose property management software cannot generate the [NAHMA XML Standard](#) 5.0, 6.0, or 7.0 for upload into Procorem.



It is not necessary to click the Submit Tenant Events button until all certs have been captured for the compliance year; this function will prevent further entry of tenant events. If that button is inadvertently clicked, please notify your Asset Manager to unlock the site in Procorem.

All sites, regardless of subsidy sources, will be required to submit tenant events through Procorem. TRACS functionality is not offered through this platform. PBCA developments whose data has been historically transmitted to RIHousing by way of TRACS will continue to submit tenant events through their property management software in order to maintain compliance with HUD regulations and to avoid delays in receiving voucher payments. In addition to the monthly TRACS submission, PBCA sites with RIHousing financing, LIHTC, HOME or any other ancillary funding source must also upload their tenant events into Procorem by the 10<sup>th</sup> of the month.

Straight PBCA sites without a RIHousing, LIHTC, or ancillary funding layer are exempt from uploading tenant events into Procorem for the time being.

#### **DATA INTEGRITY**

Procorem cross-references certain identifier fields within an XML file before accepting a tenant event upload into the system. Each Compliance workcenter will contain a site-specific Excel report detailing the Property Name, BIN, Building Name (address), and Unit # as they are listed in Procorem. The records in your property management software must match the corresponding identifiers in Procorem.

Any discrepancies in the data between the Property Name, BIN, Building Name (address), or Unit # will prevent the upload of tenant events corresponding to any units with incompatible identifiers. Property managers may need to engage with their own Compliance and/or IT staff; changes that cannot be made to the required fields within your agency should be escalated to your property management software provider.

#### **MARKET UNITS**

Developments with less than 100% affordable units are hereby required to report on market units in Procorem. In LIHTC properties, a market unit is a non-LIHTC unit. Similarly, sites with ancillary programs may have an affordable unit percentage less than 100%, resulting in units with no affordable programs associated to them; for the purpose of data collection, those are also market units.

Reporting requirements on market unit households is limited to the apartment number, tenant paid rent, utility allowance (if applicable), and gross rent. Household names are not required as part of the tenant event submission. Owners and management agents may opt to report household names as “Market” and “Unit” as the first and last names, respectively.



### **ASSET MANAGEMENT**

Procorem contains a workcenter with a folder structure arranged by fiscal year and fiscal quarter. This secure workcenter will replace the email boxes that are currently used for financial submissions, NOP subsidy requests and escrow analysis. Partners will upload required data to the workcenter folder associated with the fiscal period of the submission, response or subsidy request. Additionally, a standard template document will accompany all financial submission types which will facilitate monitoring of performance data, ratios and trends. Within the Asset Management workcenter, folders containing forms and communications related to the processing of escrow analysis and operating subsidy requests will be shared. The workcenter will combine all financial related submissions into a central location in order to allow for a more efficient and secure submission process, as well as quicker financial reviews and communications.

### **MULTIFAMILY INSPECTIONS & FILE REVIEWS**

RIHousing allows the owner/agents of multifamily properties the opportunity to choose whether file reviews are performed on site or remotely by providing access to SharePoint. LIHTC and ancillary funded properties will continue to receive the same choice in Procorem. File reviews of PBCA sites with no further multifamily funding will remain in SharePoint until further notice.

The Procorem Users section of this Program Bulletin refers to a requirement that at least one employee from both the ownership entity and the management agent are registered in Procorem. RIHousing Asset Managers will notify both the owner and management agent of inspections, findings, and other compliance items. Procorem will serve as the delivery method of inspection notifications, delivery of inspection reports, and other correspondence. Registered users should upload inspection responses via Procorem.

### **OWNER'S CERTIFICATIONS**

Owners of LIHTC and ancillary sites are required to certify continued program compliance annually. Procorem will be used to distribute and collect the documents required for this purpose at the end of each compliance year.

### **NAVIGATING THE WORKCENTERS**

The possibilities within Procorem are not limited to the information provided in this Program Bulletin. RIHousing intends to implement further tasks and features including Quarterly Waiting List Reporting in the near future and on an ongoing basis.

**Files** | Each property will have nearly identical file structures unique to their property funding and compliance layers. Site-specific legal and recorded documents such as the Regulatory Agreement, LURA, 8609's, etc. will be available in Procorem; if they are not yet available when you explore your workcenter, please be patient while we perform our processes to upload these items. When submitting a document for a task, the file path where the item



should be stored will be identified within the Location field within a task.

**Posts** | Communicate with your Asset Manager directly through Procorem using the Posts feature. Each Compliance workcenter comes with a default post directing users to ProLink's online training featuring tenant events.

**Tasks** | A Procorem workcenter may be built to remind users of upcoming deadlines and reminders of past due deadlines with built-in tasks.

**Calendar** | Tasks with dates assigned to them will be reflected on the calendar in a workcenter.

**Links** | Save unnecessary clicks when visiting sister workcenters. This option will only be available to properties with more than one workcenter.

### **TECHNICAL SUPPORT**

Each instance for technical support shall begin with RIHousing. Support issues may be escalated to ProLink Solutions after initial assessment by RIHousing staff.

The [Procorem Compliance Help](#) page contains resources to guide site staff through tenant event imports and manual entry.

Contact	For Help With
Lenore Coughlin <a href="mailto:lcoughlin@rihousing.com">lcoughlin@rihousing.com</a> (401) 457-1258	Technical errors including suspected system glitches or other cases where the system may not be working as intended
	Tenant Event upload errors
Your Asset Manager	Navigating a workcenter