Tenmast Software
Delinquent Tenant Program
User Manual

Table of Contents

<u>Introduction</u>

The Tenmast Delinquent Tenant Program is a standalone module that maintains a list of former housing authority tenants who, when their tenancy terminated, had a delinquent account. The delinquent tenant record can include a "reason for delinquency" code and a "status" code.

This version of Delinquent Tenant does not integrate with the Occupancy and Rent Calculation program. So you will have to add delinquent tenant records to the program manually. Once a list of delinquent tenant is added to the program, the program allows the user to search the list by name and social security number, and it reports the status of that account. The user can also edit the records to update the status of the delinquent account at any time.

The following is a user manual for the Delinquent Tenant Program.

<u>Main Menu</u>

When you start the Delinquent Tenant Program, you will be required to enter the usual security information (username and password) and select the data area in which the delinquent tenant data is stored. Once you have made those selections, the following main menu screen will appear.

The main menu consists of four main functions: Search/Edit/Review DTenants, Print Reports, Re-index tables and Maintain Setup Data. The main menu also contains a "Version Check" button in the upper left-hand corner of the screen.

<u>Setup</u>

The Setup area of the program contains a number of helpful options that will make the program more useful. To enter the Setup area, click the Setup button from the main menu and the following Default Settings screen will appear:

The Setup screen contains three tabs: Default Settings, Status Codes and Reason Codes. The Setup area also contains a Toolbox button with an option to setup collection agency information. Each tab is described below.

The Default Settings tab contains information about your Public Housing agency. This information will appear on reports you print from the program. To edit the information, click the Edit button on the toolbar and make the changes in the appropriate data fields. When done, click the Save button to save your changes or the Cancel button to cancel the changes you made.

<u>Reason Codes</u>

The program allows you to add Reason codes to each delinquent record to reflect the reason the tenant account is considered delinquent. For example, the Reason codes

might include "evicted from unit," "misreported income" or "moved without notice." Once you have created these codes in Setup, you can select them from a drop-down list on your delinquent tenant record. You can also print delinquent tenant reports selected by the Reason codes you created.

To add, edit or review Reason codes, click on the Reason Code tab and the following screen will appear:

To add a Reason code, click the Add button on the toolbar and the Reason Code and Description fields will appear blank at the bottom of the screen. Enter a Reason Code and Description for the new Reason code and click the Save button on the toolbar. The new Reason Code will then appear in the list on the screen.

You can also delete a Reason Code by highlighting it on the list and clicking the Delete button on the toolbar. If you want to change the code for an existing Reason Code, you must use the Reason Code change button on the toolbar.

Status Codes

The program allows you to add Status codes to each delinquent record and change the status of each delinquent tenant record over time. For example, a status code would include "referred to collection agency," "collected," "partially collected" or "written off." Once you have created these codes in Setup, you can select them from a drop-down list

on your delinquent tenant record. You can also print reports selected by the Status codes you created.

To add, edit or review Status codes, click on the Status Code tab and the following screen will appear:

To add a Status code, click the Add button on the toolbar and the Status Code and Description fields will appear blank at the bottom of the screen. Enter a Status Code and Description for the new status code and click the Save button on the toolbar. The new Status Code will then appear in the list on the screen.

You can also delete a Status Code by highlighting it on the list and clicking the Delete button on the toolbar. If you want to change the code for an existing Status Code, you must use the Status Code change button on the toolbar.

Collection Agencies

If you typically refer delinquent accounts to a collection agency, the program allows you to add collection agencies to a global list of outside agencies maintained by the Tenmast programs. This is the same global list of outside agencies that is available to you in the Occupancy and Rent Calculation program. Once a collection agency record is added in Setup, you can select the agency record on the delinquent tenant screen and associate the agency with that collection account.

To add a collection agency record to the global list, click on the Toolbox button on the Setup screen toolbar and select the Maintain Outside Agency option from the drop-down list. The following screen will appear:

To add a collection agency to the list, click the Add button on the toolbar and the agency information fields will appear blank at the bottom of the screen. Enter the name, street address, phone, fax and e-mail information in the appropriate fields and click the Save button on the toolbar. The new agency will then appear in the list on the screen.

You can also delete an agency by highlighting it on the list and clicking the Delete button on the toolbar.

Add a Delinquent Tenant Record

To add a delinquent tenant record to the database, click the Tenants button on the main menu and the following browse screen will appear.

From the browse screen, click the Add button at the bottom of the screen and the following Add Delinquent Tenant wizard screen will appear:

Add Tenant (Step 1 of 6)

Enter Tenant Information

Social Security #	812-57-4687
First Name	SHIRLEY
Middle Initial	D
Last Name	JOHNSON
Date Added	07/16/2002

Instructions

Enter Tenant's social security number, name, and date added when it is added to Delinquent Tenant List

Start >>   Cancel

The Add Tenant wizard steps you through the process of adding a delinquent tenant record to the database. On the first wizard screen, enter the Social Security number and name of the tenant on the first wizard screen. The Date Added field defaults to the current system date, but you can edit the date by typing in the correct date or clicking on the date icon to the right of the field. When all the data is entered, click the Start button and the next wizard screen appears.

Add Tenant (Step 2 of 6)

Confirm Tenant Social Security Number and Name

Social Security # 812-57-4687

Tenant Name SHIRLEY D JOHNSON

Instructions

Please verify this Tenant's name and Social Security Number. The program will now look through the delinquent Tenant List to verify the Tenant is not already on the list. This may take some time. Thank you for your patience!

« Back   Next »   Cancel

Before adding the tenant data to the database, the program will search the existing delinquent tenant database to determine if a similar tenant record already exists in the database. The second wizard screen asks you to confirm the tenant data you entered before the program searches for similar records. Once you have confirmed the tenant data you entered, click the Next button.

If the program finds an existing record for the same tenant name or SSN you are adding, a message will appear to indicate that a similar record already exists. If you see this message, you should cancel the Add Tenant wizard and review the matching delinquent tenant record to confirm it is the same person. If no matching record is found, the following wizard screen will appear.

Add Tenant (Step 4 of 6)

Enter Other Tenant Data

Social Security # 812-57-4687

Tenant Name SHIRLEY D JOHNSON

Amount Owed 390.00

Reason EVICTED FROM UNIT

Status ASSIGNED TO COLLECTION AGENCY

Instructions

Enter Amount Owed, Status and Reason Code information about this Tenant.

Back   Next   Cancel

On the third wizard screen, you can enter the amount owed on the delinquent account. You can also select a Reason Code and a Status Code from the drop-down boxes. (The Reason Codes and Status Codes that appear in the drop-down boxes are the codes you created in Setup.) When you have entered the data, click the Next button and the following wizard screen will appear:

Enter Tenant Note

Social Security # 812-57-4687

Tenant Name SHIRLEY D JOHNSON

Notes Damaged unit.

Instructions

Enter any other comments about the Tenant's List. This will be saved as a note attached to the Tenant.

Back   Next   Cancel

On the fourth wizard screen, you can enter notes about the tenant account. This is a free-form field and you can enter as much text as necessary. When you have entered the data, click the Next button and the final wizard screen will appear.

```
Add Tenant (Step 6 of 6)                                              [X]
                        Confirm New Tenant Information

        Social Security #    812-57-4687

           Tenant Name       SHIRLEY D JOHNSON

            Date Added       7/16/2002

          Amount Owed        390.00

               Reason        EVICTED FROM UNIT

               Status        ASSIGNED TO COLLECTION AGENCY


               An explanatory note will be added - Press Back to see its text




Instructions
              Confirm the Tenant Datea you entered and click Finish to complete the task.


                       [ << Back ]  [ Finish >> ]              [ Cancel ]
```

On the final wizard screen, confirm that the information you entered is correct. If you need to correct any information you entered, click the Back button to return to the appropriate screen and make the changes. When you have completed making any necessary changes, click the Next buttons on the screen to return to the final wizard screen. When you have confirmed that the data on the final wizard screen is correct, click the Finish button to complete adding the new delinquent tenant record to the program.

Search Delinquent Tenant Database

To search the delinquent tenant database, click the Tenants button from the main menu and the following browse screen will appear.

Browse Tenants

Last Name	First Name	Mid	SSN	Status
ASKEY	KURT	T	364-47-4189	NEW DELINQUENT TENANT - N
BANVELOS	ANNABELLE	O	455-78-1585	AMOUNT COLLECTED
BREECE	HILLARY	I	093-42-2423	UNDER A REPAYMENT AGREEI
KNIGHT	NELSON	E	614-56-4216	ASSIGNED TO COLLECTION AGI
LANGLAIS	KURT	C	336-15-4150	ASSIGNED TO COLLECTION AGI
LARRIN	JESSE	T	953-97-4828	AMOUNT COLLECTED
LINTON	DARRYL	N	687-44-5517	ASSIGNED TO COLLECTION AGI
LUTTON	MARGERY	C	647-47-4185	ASSIGNED TO COLLECTION AGI
MCGARRAH	GUY	N	648-54-5151	ASSIGNED TO COLLECTION AGI
MENNELLA	LONNIE	R	655-45-7411	UNDER A REPAYMENT AGREEI
ORTEGON	KELLY	R	321-35-4151	ASSIGNED TO COLLECTION AGI
RIZZUTO	NANNIE	S	304-03-9291	NEW DELINQUENT TENANT - N
SEVERNS	ALLYSON	D	874-34-3994	ASSIGNED TO COLLECTION AGI

Sort By: Last Name, First Name / Social Security Number / Status

Search For [ ] Go

+ Add   Edit / Review   Close

On the browse screen, you can either enter a search string in the Search For field, or you can scroll down the list to manually search the records. In either case, you should first select the best Sort By criteria (Last Name, Social Security Number or Status) in the upper, right-hand side of the screen. When you change the sort criteria, the list of delinquent tenants will reorder itself according to the selected criteria.

To search by a name or social security number, enter the first few characters of your search in the Search For field and the record marker on the left side of the screen will automatically scroll down to the first record in the list that starts with those characters.

Once you have found a delinquent tenant record that matches your search, you can review the record either by double-clicking on the record or by clicking on the Edit/Review button at the bottom of the screen while the record is highlighted. When you do either, the delinquent tenant screen will appear. (See the section on Edit/Review a Delinquent Tenant Record, below, for detailed description of the Delinquent Tenant screen.)

Edit/Review a Delinquent Tenant Record

To edit or review a delinquent tenant record, click the Tenants button from the main menu and the browse screen will appear. (For a detailed description of the Browse screen, see the section on Searching the Database, above.) On the Browse screen, highlight the tenant record you wish to edit or review and click the Edit/Review button at the bottom of the screen and the following Tenant screen will appear.

The main delinquent tenant screen consists of two *sub*-tabs, marked Details and Collection Information. The Details sub-tab lists the SSN, name and address of the delinquent tenant. The Details sub-tab also lists the reason and status code for the delinquent tenancy and balance due on the tenant account.

Add Collection Agency

If you have referred the tenant to a collection agency, you can record the collection information on the Collection Information sub-tab. When you click on the Collection Information sub-tab, the following screen appears:

Collection agencies are added to a global database of Outside Agencies in the Setup area of the program. On the Collection Information tab, you can assign a collection agency to the delinquent tenant account through the Toolbox option on the toolbar. To assign a collection agency, click the arrow to the right of the Toolbox, select the Insert Agency option from the drop-down menu, and the following dialog box will appear:

Select Agency to Insert

Agency Name	Care Of	Address	City	S...	Zip	Phone
CHILD/SUPPORT						
JEFFERSON COUNTY HUMAN SERVICES						
JEFFERSON COUNTY SOCIAL SERVICES		900 JEFFERSON COUNTY PKWY	GOLDEN	CO	80401	(303)2
SOCIAL SECURITY ADMINISTRATION	NICOLE	101 MAIN STREET	LEXINGTON	KY	40502	(800)1
SOCIAL SECURITY ADMINISTRATION		8585 W 14TH AVE	LAKEWOOD	CO	80215-	(800)

The list of agencies on this screen can be sorted by any of the data fields at the top of the list. The default sort order is by Agency Name. To change the sort order, click on the field name at the top of the list. To add an agency record to the delinquent tenant record, highlight the appropriate agency and click the OK button.

When you click the OK button, the program will return to the Delinquent Tenant screen. You can also edit the Date Paid, Amount Paid, Date Written Off and Amount Written Off fields on the Collections tab. To do so, click the Edit toolbar button and then make your changes. When done, click the Save button to save those changes or the Cancel button to cancel any changes you have made to the record.

Change Log

The Delinquent Tenants program automatically maintains a Change Log of all changes you make to each delinquent tenant record. The change log is available to review on the Change Tracking tab. When you click on the Change Tracking tab, the following screen appears:

The Change Log tab lists each of the changes you have made to the delinquent tenant record. Each log entry includes the date of the change, and a description of the type of change. Change records are entered on the Change Log tab automatically when you make a change to the delinquent tenant record. You cannot edit the Change Log, but you can print the list of changes by clicking on the Print or Print Preview icons on the toolbar.

Reports

The Delinquent Tenant program offers a variety of built-in reports. To access the reports, click on the Reports button on the main menu and the following reports screen will appear.

Select the report you need to print from the left side of the screen and make the necessary report configuration settings on the right side of the screen. When your selections are made, click on the Print button or the Print Preview button on the toolbar.

<u>Index</u>

Like any database, it may be necessary to re-index the delinquent tenant database from time to time. This also may be helpful if the program is running more slowly than usual or your are having difficulty finding tenant records that you know are in the database. To re-index, click the Index button on the main menu and the following Index dialog box appears.

ReindexDtlistForm

This function requires exclusive use of the Database. You must make sure that no one else is in the application!

Application Files to Reorganize

☑ Current

☐ History

Reorganization Options

☑ Re-Index

☐ Pack

✔ OK   ✗ Cancel

Select the database you want to re-index, place a check mark next to Re-Index at the bottom of the box, and click OK. When the re-index process is complete, the screen will return to the main menu.