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Tenant Assistance Plan Reporting Tool User Guide for Developers and TRCs

Purpose

A Tenant Assistance Plan (TAP), required under the Tenant Protection Bylaw, is created, submitted and approved using the confidential, online Tenant Assistance Plan Reporting tool. Use this step-by-step technical guide to learn how to submit all required information using the TAP Reporting tool after you have read the Developer's Guide to Tenant Assistance and Relocation.

There are two key online tools you will use to create and get approval for your Tenant Assistance Plan.

1. **Tenant Assistance Plan Reporting Tool**: where you'll input information, communication records and all other required documents for each tenant, through each phase of the tenant relocation and compensation process.
2. **TAP Administration Tracker**: where you'll submit required TAP reports once completed in the reporting tool and track approval. Communications to all tenants (e.g., initial notice of the proposed redevelopment, meeting notices, etc.) are attached in the administration tracker rather than entering them for each tenant in the reporting tool.

About the TAP Reporting Tool

The TAP reporting tool works similarly to an Excel file with some automated features that automatically calculate certain fields once data is entered.

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The reporting tool has several tabs that align with the report required for each phase of the Tenant Assistance Plan:

- TAP Part A
- TAP Part B

Together, form the completed Tenant Assistance Plan

- Compensation Report
- Compensation Execution Summary
- Right of First Refusal Report (for rental redevelopment projects)

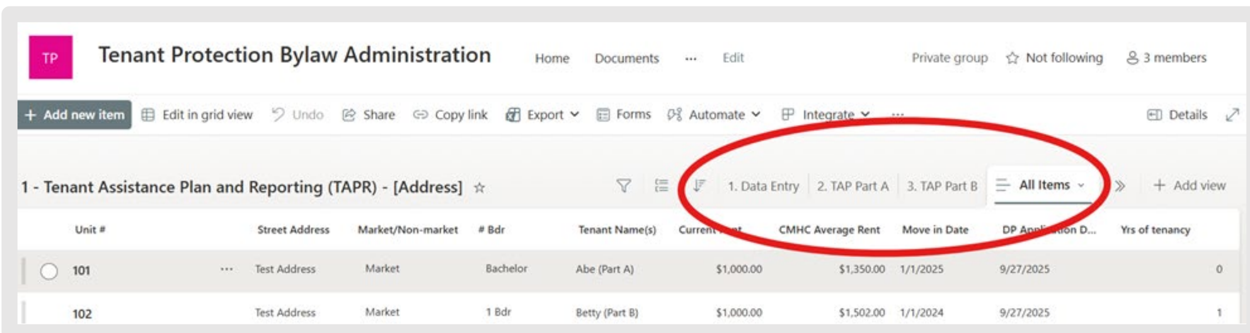

Figure 1.1 – Tabs on the top right side of the page correspond to each required TAP report.

How to Start a Tenant Assistance Plan

1. Appoint or engage a Tenant Relocation Coordinator (TRC) for the project.
2. Submit the [Tenant Assistance Plan Initiation Form] and provide all necessary project and contact information.
3. City staff will email links to a project-specific TAP Reporting tool, TAP Administration Tracker. Links are restricted to the email address provided in the initiation form.
4. Users must be authenticated when the forms are first accessed through email verification codes or have pre-established authentication with a Microsoft account[1].

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[1] Authentication methods are based on Microsoft's security requirements and may include email verification codes or pre-established authentication with a Microsoft Account. (A Microsoft account can be created with any email address by visiting the Microsoft website.)

Working Through the TAP Process

1. How to enter tenant data

There are two ways to enter tenant household data into the TAP Reporting tool:

- Individually enter each tenant
- Import from an Excel file or another spreadsheet or table

Individual entry

1. Click “+ Add new item” on the top left of the page to open an input window for new household and tenant information.
2. Complete all fields up to the end of the TAP Part A section.
3. Click save at the bottom right of the page.
4. Repeat for each tenant in the household.

Importing from a spreadsheet or table

If the tenant information has already been recorded in a spreadsheet or table, this information can be copied directly into the TAP Reporting tool list. See Appendix A for more information.

2. How to submit reports

There are two steps to complete a TAP report.

1. Enter the required report information for each tenant in the TAP Reporting tool.
2. Mark the report as complete and enter a submission date in the TAP Administration Tracker.

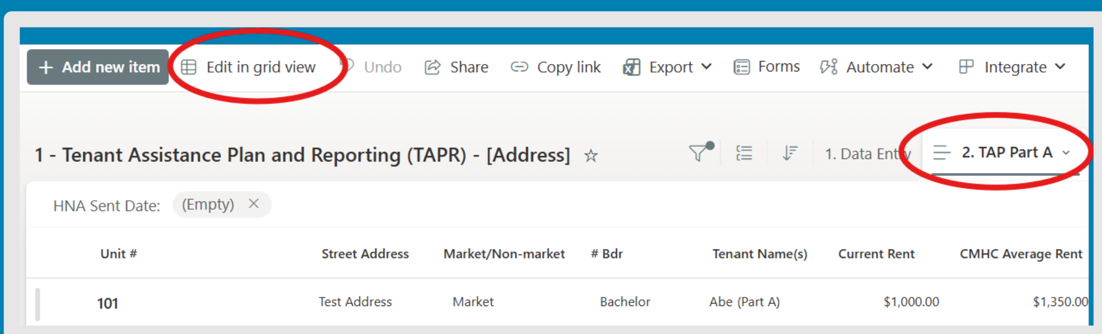
Enter required tenant information in the TAP Reporting Tool

1. Select the report you want to complete.
2. Open an input window by double clicking on the tenant household you wish to edit.
3. Complete all the fields for your report.
4. Click save at the bottom of page.

Note: Each tab lists only the tenants with incomplete information for that report. Once all required information is entered, a tenant will only be listed in the next report to be completed. If you don't see all the tenant names in your report, you should go back to the previous report and ensure all required information has been entered for the tenant of that household.

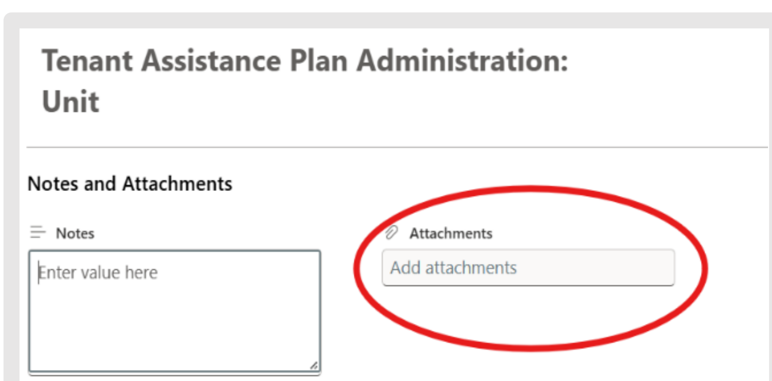
TIP: You can save time when entering the same information for multiple tenant households (i.e., HNA Sent)

1. Select the "2. TAP Part A" tab.
2. Click "Edit in grid view" in the toolbar.
3. Double click the field in the first row you want to edit and then exit the field.
5. Single click back into the field and drag down the fill handle to duplicate the information into rows below.
6. Click "Exit grid view"



Attach documentation

Documented communication with tenants, completed forms and payment receipts are required for your reports and can be uploaded via the "Attachments" link.



Documentation containing private tenant information must be uploaded to TAP Reporting tool.

Follow required naming format for documents

Report name-Tenant last name-Documentation_description

e.g., TAP-PartA-Smith-HNA_sent_email

Ensure your TAP reports are complete

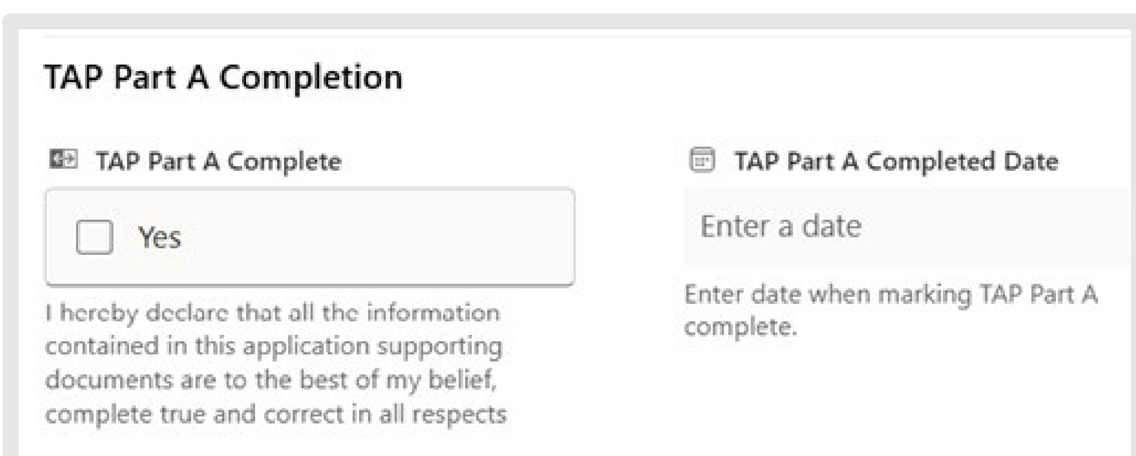
To register as complete, each report requires you to enter a specific data field:

TAP Report	Required data field
TAP Part A	HNA Date Sent
TAP Part B	Summary of communication (TAP Part B)
Compensation Report	Summary of communication (Compensation Report)
Compensation Execution Summary	Tenant Compensated
Right of First Refusal (RoFR) Report	Summary of communication (RoFR)

Submit completed reports in the TAP Administration Tracker

1. Click on “Edit all” on the top left corner of the page.
2. Scroll to the report you want to submit.
3. Click to mark the report as complete.
4. Enter completion date.

Notices that are provided to all tenants can be uploaded in the TAP Administration Tracker.



Report approval timeline

After submitting your completed report, you will receive a confirmation email. City staff will review and follow up within 10 business days.

Once the report is approved, you will receive an email confirming approval and outlining next steps. Appropriate City departments will be informed of approval and the permit to be issued.

Appendix A: Importing data from a spreadsheet or table

If the tenant information has already been recorded in a spreadsheet or table, this information can be copied directly into the TAP reporting tool. Data must be formatted into columns with exact text options where indicated.

Sample data set for reference

Unit #	Street Address	Market/ Non-market	# Bdr	Tenant Name(s)	Current Rent	Move in Date	Interim housing offer (Y/N)
101A	123 Any St	Market	1	John Doe	1750.00	06/15/2015	Yes

Column data options

- Unit # – enter plain text up to 255 characters
- Street address – enter plain text up to 255 characters
- #Bdr – enter one of the following:
    - Bachelor
    - 1 Bdr
    - 2 Bdr
    - 3 Bdr
    - 3+ Bdr
- Market/Non-market - enter either:
    - Market
    - Non-market
- Tenant name(s) – enter plain text up to 255 characters
- Current rent – enter numerical value of monthly rent (with or without $)
- Move in date – enter the date in the format MM/DD/YYYY
- Interim housing offer will appear in the list as either blank or checked – enter either:
    - Yes
    - No

To import data

1. Copy the information from your spreadsheet or table, up to 100 rows at a time. Do not include headers.
2. In the reporting tool, select the “1. Data Entry” tab in the upper right of the page.
3. Click “Edit in grid view” from the toolbar.
4. Click “+ Add new item” under the “Unit #” column header. Select the cell (single click). Exit the cell if the cursor is flashing and select it again.
5. Paste your data into the list. If the fields are not formatted correctly, they will appear red. Double click to choose a new option. Items left in red may not be saved.
6. Exit grid view.

Note: Many of the above fields are used in calculations throughout the TAP process. Ensure your information is accurate before completing a report.