

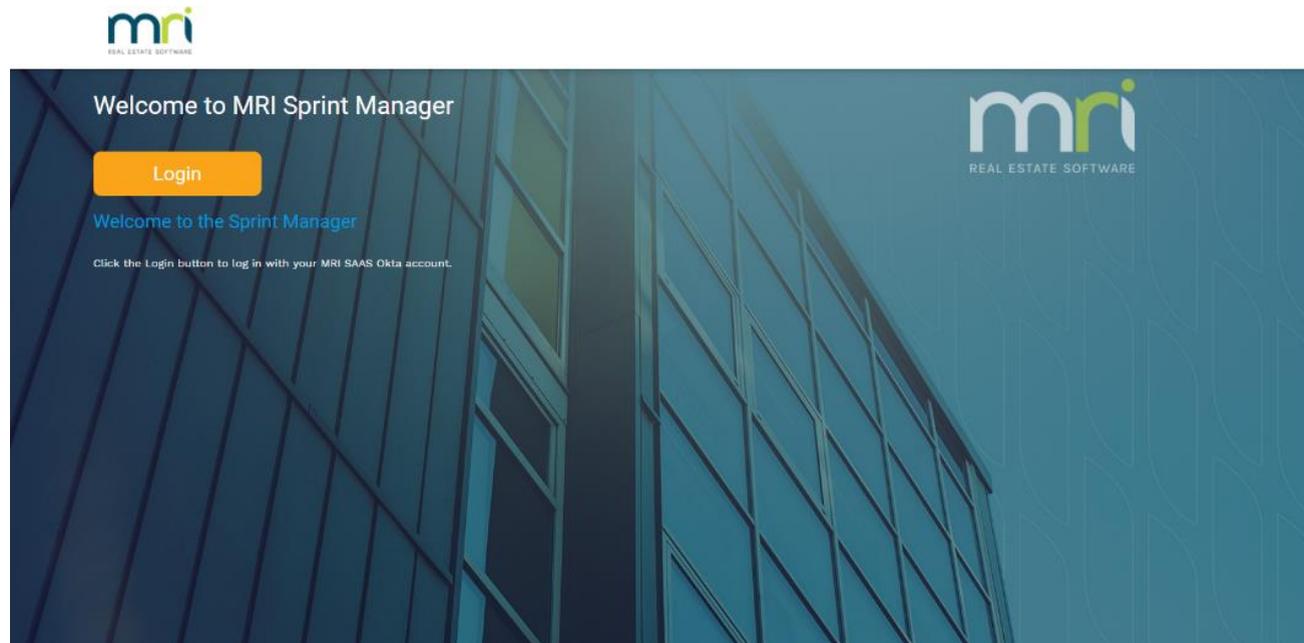
## Enterprise Occupancy Reporting Instructions

Contact your MRI Software Account Manager Mondekazi Soldati or Nancy Delgado, at [enterprise@integratec.biz](mailto:enterprise@integratec.biz) to request your username, temporary password, and property code. The property code is a unique code MRI assigns to each property.

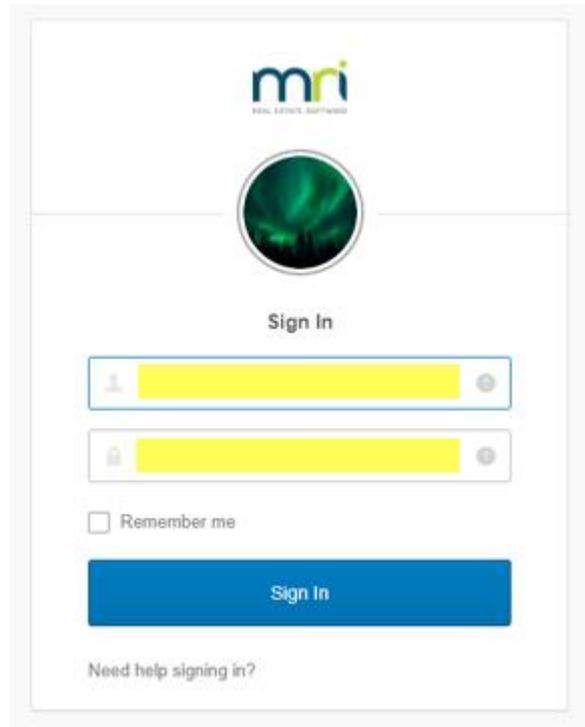
- **Note:** Please provide an e-mail address that you would like to be used *as your username* and also include the property(s) for which you will be responsible reporting for.

### Instructions for logging into MRI Software:

1. Go to <https://enterprise.investment.mrisoftware.com>
2. Click the **Login** button.



3. Enter your username (must be an e-mail address) in the **User ID** box and your **Password** (case sensitive) in the Password box. Then click **Sign In**.



The image shows a sign-in form for MRI (Real Estate Software). At the top is the MRI logo with the tagline "REAL ESTATE SOFTWARE". Below the logo is a circular profile picture placeholder with a green and black abstract image. Underneath the profile picture is the text "Sign In". The form contains two input fields: the first is for the User ID (username) and the second is for the Password. Both fields are currently empty and have a yellow highlight. Below the password field is a checkbox labeled "Remember me". At the bottom of the form is a blue "Sign In" button. Below the button is a link that says "Need help signing in?".

You will then be prompted to change your password. Please make sure the new password is at least 6 characters long.

If you forget your password, please contact [enterprise@integratec.biz](mailto:enterprise@integratec.biz) to request a temporary password. All that needs to be provided is the username for the account you are using to report the occupancies.

## Instructions for entering Occupancy each month/quarter:

Once you are logged in, you will see the screen below. This is the Occupancy form where you should enter your occupancy data each month. Please follow the steps listed below to successfully enter occupancy data in the MRI website. You will only be entering information in the fields that are white.

The screenshot displays the Enterprise MRI website interface. At the top left is the Enterprise logo. The main content area is divided into two sections: 'Occupancy List' and 'Occupancy Data'.

**Occupancy List (25 records)**

ID	Property Code	Property Name	Report Date	Units	Occupied	Leased
162051	19north	19 North	10/31/2024	54	48	0
162048	19north	19 North	09/30/2024	54	50	0
162502	eashill	East Hills Village	07/31/2024	110	85	0
163019	yosmite	Yosemite Apartments	03/31/2024	31	30	0
163022	1036miss	1036 Mission Family Housing	03/31/2024	83	69	0
162204	markhe	Market Heights	02/29/2024	45	45	0
162524	friedsh	Friedrichs Supportive Housing	02/29/2024	61	61	0

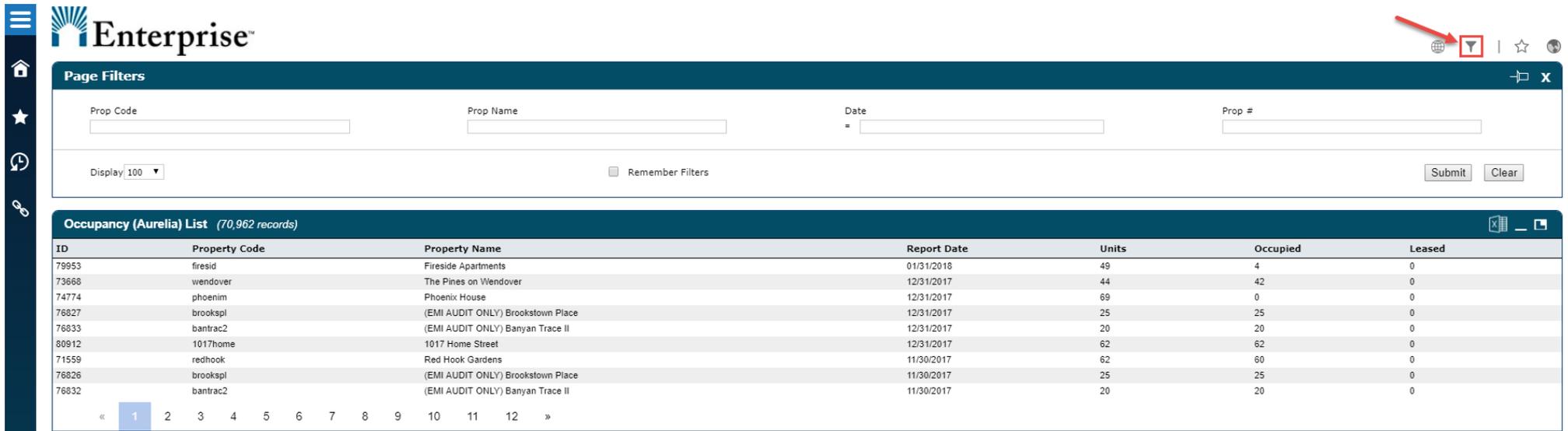
**Occupancy Data**

The form contains the following input fields:

- \* Property Code**: A dropdown menu with a search icon.
- Property Number**: A text input field.
- \* Date Reported**: A dropdown menu.
- \* YTD Move Outs**: A text input field.
- # Residential Units**: A text input field.
- # Residential Units Occ.**: A text input field.
- # Non-LIHTC Units**: A text input field.
- # Non-LIHTC Units Occ.**: A text input field.
- # Mgr./Non-Rental Units**: A text input field.
- # Mgr./Non-Rental Units Occ.**: A text input field.
- # Comm. Units**: A text input field.
- # Comm. Units Occ.**: A text input field.
- # LIHTC Units**: A text input field.
- # LIHTC Units Occ.**: A text input field.

**Note:** Position cursor over the input field name for data definition.  
 To save the occupancy record, use the Save Icon in the upper right hand corner.  
 If you are experiencing problems reporting occupancy, please contact [enterprise@integratec.biz](mailto:enterprise@integratec.biz)

Note: To expand the filter pane, click on the Spotlight icon (  ) as seen below. Simply click the Spotlight icon again to close the filter expansion.



The screenshot shows the Enterprise software interface. At the top left is the Enterprise logo. Below it is a dark blue navigation bar with icons for home, star, and search. The main content area is divided into two sections. The top section is titled "Page Filters" and contains four input fields: "Prop Code", "Prop Name", "Date =", and "Prop #". Below these fields are a "Display" dropdown set to "100", a "Remember Filters" checkbox, and "Submit" and "Clear" buttons. The bottom section is titled "Occupancy (Aurelia) List (70,962 records)" and contains a table with the following columns: ID, Property Code, Property Name, Report Date, Units, Occupied, and Leased. The table lists several records, including "Fireside Apartments", "The Pines on Wendover", "Phoenix House", and others. At the bottom of the table is a pagination control showing page 1 of 12.

**\*If this is the first time entering occupancy for your property, you will NOT be able to type the Property Code in the filter box. You will receive a message stating 'No Results were found.' This search only returns previously submitted Occupancy records. Please click the 'New' icon  found in the top right corner of the 'Occupancy Data' box and use the 'Property Code' box to select your Property Code. You will be able to enter and save a new record for your property.\***

### Icon Legend

-  = **Clone** – 'Save as New' feature
-  = **New** – create a new occupancy record
-  = **Save** – save current occupancy record

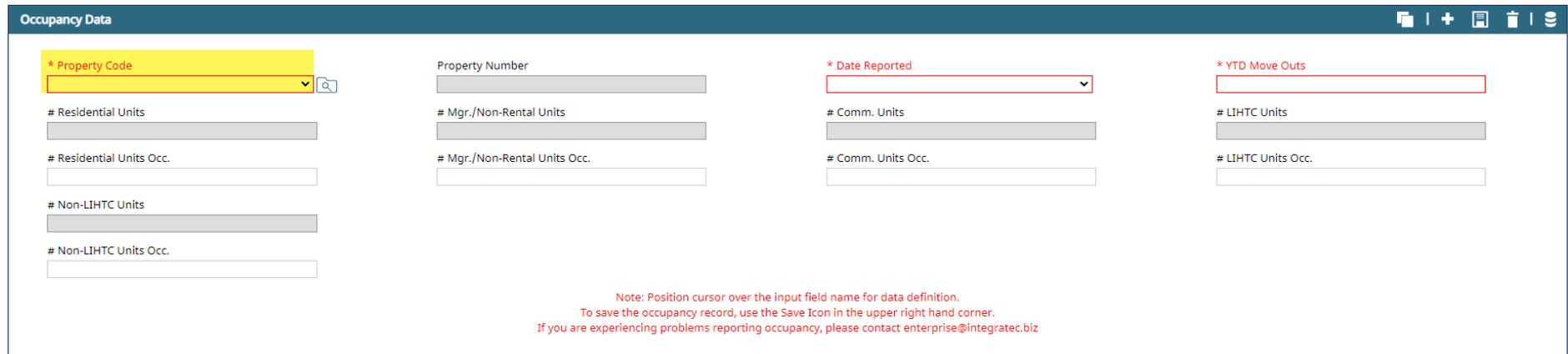
**Step 1:**

Click on the 'New' icon (  ) in the top right-hand corner of the 'Occupancy Data' box to generate a blank occupancy form.



### Step 2:

Select your property code from the 'Property Code' drop down box as shown below.



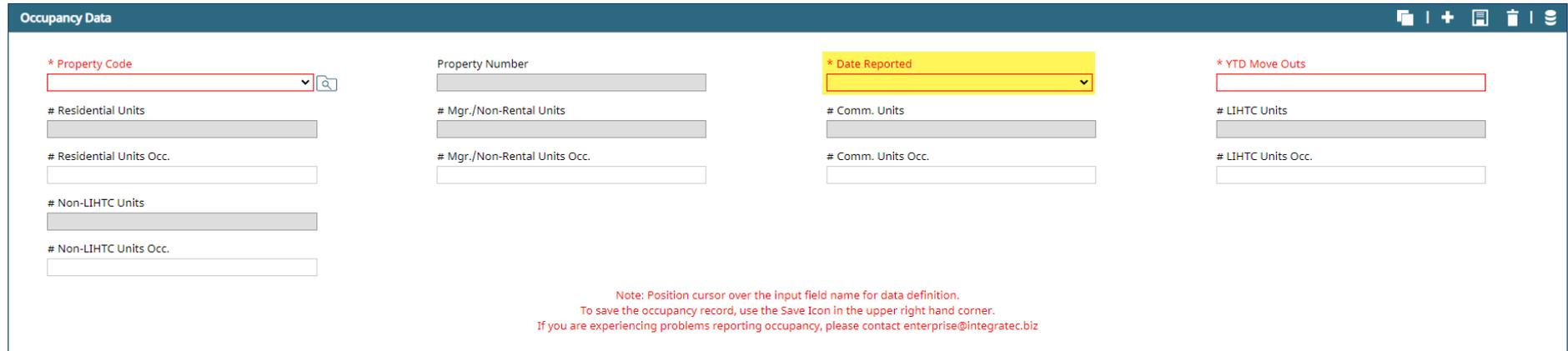
The screenshot shows the 'Occupancy Data' form with the following fields:

- \* Property Code (highlighted in yellow)
- Property Number
- \* Date Reported
- \* YTD Move Outs
- # Residential Units
- # Residential Units Occ.
- # Non-LIHTC Units
- # Non-LIHTC Units Occ.
- # Mgr./Non-Rental Units
- # Mgr./Non-Rental Units Occ.
- # Comm. Units
- # Comm. Units Occ.
- # LIHTC Units
- # LIHTC Units Occ.

Note: Position cursor over the input field name for data definition.  
To save the occupancy record, use the Save Icon in the upper right hand corner.  
If you are experiencing problems reporting occupancy, please contact [enterprise@integratec.biz](mailto:enterprise@integratec.biz)

### Step 3:

Please select the month ending date from the 'Date Reported' dropdown for the occupancy date you are reporting for. The date must always be the last day of the month.



The screenshot shows the 'Occupancy Data' form with the following fields:

- \* Property Code
- Property Number
- \* Date Reported (highlighted in yellow)
- \* YTD Move Outs
- # Residential Units
- # Residential Units Occ.
- # Non-LIHTC Units
- # Non-LIHTC Units Occ.
- # Mgr./Non-Rental Units
- # Mgr./Non-Rental Units Occ.
- # Comm. Units
- # Comm. Units Occ.
- # LIHTC Units
- # LIHTC Units Occ.

Note: Position cursor over the input field name for data definition.  
To save the occupancy record, use the Save Icon in the upper right hand corner.  
If you are experiencing problems reporting occupancy, please contact [enterprise@integratec.biz](mailto:enterprise@integratec.biz)

Once you have completed steps 1, 2, and 3 the Occupancy Data section should look like this (the totals in the gray boxes will vary based on your specific property):

The screenshot shows the 'Occupancy Data' form with the following fields and values:

- \* Property Code: test
- Property Number: 00000
- \* Date Reported: 01/31/2024
- \* YTD Move Outs: (empty)
- # Residential Units: 10
- # Mgr./Non-Rental Units: 0
- # Comm. Units: 2
- # LIHTC Units: 10
- # Residential Units Occ.: (empty)
- # Mgr./Non-Rental Units Occ.: (empty)
- # Comm. Units Occ.: (empty)
- # LIHTC Units Occ.: (empty)
- # Non-LIHTC Units: 2
- # Non-LIHTC Units Occ.: (empty)

Note: Position cursor over the input field name for data definition.  
To save the occupancy record, use the Save Icon in the upper right hand corner.  
If you are experiencing problems reporting occupancy, please contact [enterprise@integratec.biz](mailto:enterprise@integratec.biz)

### 'Clone' (Save as New) Feature

The 'Clone' (Save as New) feature will make a copy of the record that you are currently on and allow you to only update the fields that have changed from the prior month/quarter. To utilize the 'Clone' feature, select the most recent occupancy record that has been saved in the system for your property. Click on the 'Clone' image  in the top right corner (highlighted below) and select a new month ending date from the 'Date Reported' dropdown. You must select a new month ending date. Finally, make any necessary changes and save the record using the Save  icon in the top right-hand corner.

This screenshot is identical to the previous one, but with a red box highlighting the 'Clone' icon (a document with a plus sign) in the top right corner of the form's header. A red arrow points from the text below to this icon.

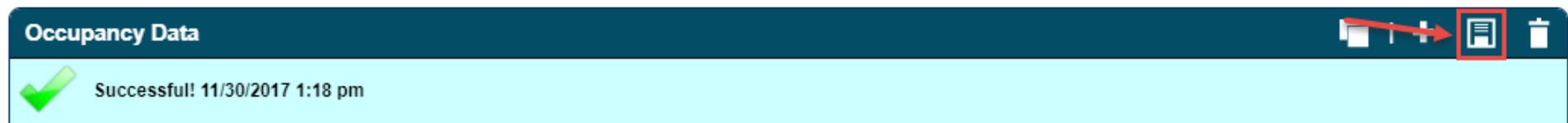
#### Step 4:

Enter the following information for your property for the selected month ending date:

- YTD Move Outs – *Total number of year-to-date move-outs from the beginning of the year through the month or quarter-end*
- # Residential Units Occ. – *Total number of LIHTC units and Non-LIHTC units qualified (market) units*
- # Mgr./Non-Rental Units Occ. – *Total number of units set aside for full-time employees of the property, including management, maintenance, or security staff*
- # Comm. Units Occ. – *Total number of separate spaces for commercial tenants within the property buildings*
- # LIHTC Units Occ. – *Total number of units that are operated in a manner so as to qualify as low-income units within the definition of Section 42(i)(3) of the IRC*
- # Non-LIHTC Units Occ. – *Total number of units not subject to Section 42 income and rent restrictions [includes Manager/Non-Rental units, Commercial Units, and Non-LIHTC Qualified (Market) units]*

#### Step 5:

After entering all occupied totals for the selected month, press the 'SAVE'  icon in the top right-hand corner of the Occupancy Data box. You will see 'Successful!' if all data has been entered correctly.



## Step 6:

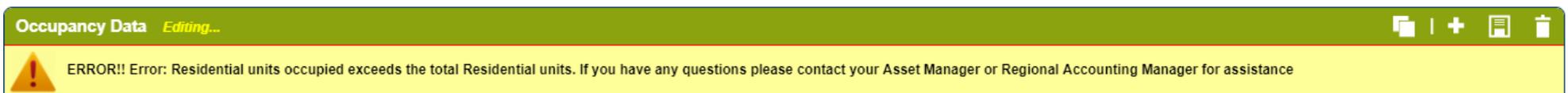
After the transaction has been saved successfully, you are finished entering the occupancy data. You can repeat the steps above for additional properties and/or months. To view the saved occupancy record you will need to refresh the page. To sign out, click on your first and last name in the bottom right-hand corner, and you will see the pop-up as shown below. Click 'Log Out'. If you have any problems, please contact [enterprise@integratec.biz](mailto:enterprise@integratec.biz).



### Additional Notes

You may receive one of the error messages below if you are attempting to save data that has been entered incorrectly.

#### **Possible Error Message #1:**



Occupancy Data Editing...

**ERROR!!** Error: Residential units occupied exceeds the total Residential units. If you have any questions please contact your Asset Manager or Regional Accounting Manager for assistance

* Property Code test	Property Number 00000	* Date Reported 01/31/2024	* YTD Move Outs 4
# Residential Units 10	# Mgr./Non-Rental Units 0	# Comm. Units 2	# LIHTC Units 10
# Residential Units Occ. 12	# Mgr./Non-Rental Units Occ. 0	# Comm. Units Occ. 2	# LIHTC Units Occ. 10
# Non-LIHTC Units 2			
# Non-LIHTC Units Occ. 2			

Note: Position cursor over the input field name for data definition.  
 To save the occupancy record, use the Save Icon in the upper right hand corner.  
 If you are experiencing problems reporting occupancy, please contact [enterprise@integratec.biz](mailto:enterprise@integratec.biz)

This error indicates that at least one of the numbers you entered is a greater value than the total stored in the system (gray boxes).

Please correct the number you are entering so it does not exceed the total stored in the system. If you believe the total in the system needs to be updated, please email [enterprise@integratec.biz](mailto:enterprise@integratec.biz). Users are not able to update these fields on their own as they are locked fields in the system.

**Possible Error Message #2:**

Occupancy Data Editing...

**ERROR!!** Error: The Unit Mix does not reconcile. The total of Residential + Manager/Non-Rental + Commercial must = LIHTC + Non-LIHTC. If you have any questions please contact your Asset Manager or Regional Accounting Manager for assistance

This is NOT an error with the system. This error indicates that the number of Residential Units Occupied + Mgr./Non- Rental Units Occupied + Commercial Units Occupied *does not equal* LIHTC Units Occupied + Non-LIHTC Units Occupied. The occupancy record WILL NOT SAVE if the numbers you entered are not corrected.

Occupancy Data Editing...

**ERROR!!** Error: The Unit Mix does not reconcile. The total of Residential + Manager/Non-Rental + Commercial must = LIHTC + Non-LIHTC. If you have any questions please contact your Asset Manager or Regional Accounting Manager for assistance

* Property Code test	Property Number 00000	* Date Reported 01/31/2024	* YTD Move Outs 4
# Residential Units 10	# Mgr./Non-Rental Units 0	# Comm. Units 2	# LIHTC Units 10
# Residential Units Occ. 10	# Mgr./Non-Rental Units Occ. 0	# Comm. Units Occ. 2	# LIHTC Units Occ. 9
# Non-LIHTC Units 2			
# Non-LIHTC Units Occ. 2			

Note: Position cursor over the input field name for data definition.  
 To save the occupancy record, use the Save Icon in the upper right hand corner.  
 If you are experiencing problems reporting occupancy, please contact [enterprise@integratec.biz](mailto:enterprise@integratec.biz)

Please correct the numbers you are entering so the following equation is true:

Residential Units + Total Commercial Units + Total Mgr./Non-Rental Units **must equal** Total LIHTC Units + Total Non LIHTC Units

**Possible Error Message #3:**

Occupancy Data Editing...

**ERROR!!** Checks if a record with a given code and date reported already exists.

This error indicates a record has already been entered in the system for the property code *and* date you are attempting to save. Please verify you have selected the correct 'Property Code' and 'Date Reported' dropdown fields.