Domin-8 Management Plus™ v5.8.1 Release Notes

February 2010

The primary purpose of this release is to address customer specific issues and enhancements to the system. Click the following link to download and install the update: http://csp.domin-8.com/dnn/SoftwareUpdates/tabid/65/Default.aspx

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Overview

The following key features and enhancements have been included in this release and are documented in more detail in the following sections.

V5.8.1 Changes:

- A newly designed Company Preferences Screen that categorizes all of the options appropriately, making them easier to find and manage.
- New option to control how the system calculates your unit Potential Rents
- New option to control how your Scheduled Charge Stop Dates default, in relation to your Lease End Dates.
- Ability to filter Work Orders by Technician
- A HUD Move Out due to the death of a sole member can now be handled differently.
- Tax Credit Tenant Income Certification (TIC) updates
- Ability to designate households to different set-asides.
- Tax Credit properties now have the option to show their Applicable Fraction and Target Fraction Percentages during the certification/interview process and enforce them.
- HUD BMIR contracts now allow you to determine the Eligibility of each individual member.
- New options to enhance performance when checking your Household Statuses with Background Screening as well as an option to turn off the Rent-To-Income calculations in screening.

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V5.8 Changes:

- ePay Enhancements for both Check Scanning and Tenant Initiated ACH Payments
- Background Screening Enhancements
- Extensive Security Enhancements
    - Password Strength
    - User and Company Level Security Options
    - Post to Prior Period Options
- Reports
    - Ability to Override & Specify Report/Document Printing & Posting Locations
    - Technician Report - Active Technician Enhancements
    - Traffic Report – Leasing Agent Changes
    - Delinquency Report – include Lease Comments
    - Management Fee Report – Print Detail
    - Ability to Eliminate Mandatory Page Breaks when Printing Posting Reports
- Affordable Housing/Compliance
    - Significant Performance Enhancements – Certification Review Screen/Processing
    -
    - Section 42 Tax Credit Tenant Income Certification State Form Updates (CA, FL, LA, MD, MA, MS, MO, NC, OH, OR, PA, TX)
    - Recalculate 50059 Security Deposits
    - HUD Handbook Changes (Lease Term 365 Days, Income Received)
    - BIN Transfers - Effective Dates
    - New Comprehensive Rent Roll Report (focused on AH)
- Work Order - Ability to do Mass Re-Assign
- Application and Wait List
    - Ability to Combine Data when Printing Audit/Tracking Report
    - Performance Enhancements
- Cash Receipt Entry Screen Enhancement
- All Hot Fixes since v5.7 as well as other customer reported issues have also been addressed. For more details, please refer to the v5.8 Release Notes on the download site.

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New Features and Enhancements this Release

New Company Preferences Screen

The Company Preferences screen has been re-designed to better group all the options, allowing you to locate preferences and make changes more quickly and easily. The previous screen consisted of just 4 tabs, with most of the options on a generic tab.

The new screen now has your tabs along the right-side. The tabs are:

- Company
- Financial
- Integration
- Daily/Monthly Defaults
- Lease Defaults
- Report Defaults
- Path Overrides

You will find all of the same options you had in the past (plus the new ones added in this service pack) in a better organized and more spacious fashion for ease of use.

New Option to Control the "Potential Rent" Calculation

Previously, Management Plus would consider the "potential" of a unit as either the ideal rent (for market renters), contract rent (for HUD units), or the most restrictive program rent (for mixes with Tax Credit, HOME, Bond, etc). A new company preference has been added that allows you to always use the Ideal/Contract rent for unit, with no regard to your layered funding max rents.

Note: If you do not have any funding sources in a specific company (Tax Credit, HOME, Bond, Other), this setting will not have any effect.

Note: The way Management PLUS calculates the "potential rent", directly affects things like Gross Potential Rent, Physical Vacancy Loss, and Economic Vacancy Loss.

New Option to Control Setting "Scheduled Charge" Stop Dates

You can now set an option that allows you to default all your Scheduled Charges to go Month-to- Month, rather than end, when the Lease End Date is reached. This enables the scheduled charges to automatically continue after a Lease End Date has passed, until you perform the final move-out.

Note: By default, the system will continue to operate as it does today and all Scheduled Charges will stop when the Lease End Date is reached.

If you change this option (to automatically continue Scheduled Charges), the system will ask if you'd like to update all of your scheduled charge stop dates.

- If you say yes, the system will change all of them for you.
- If you say no, they will be left unchanged, but all new move-ins and certifications will set the stop dates accordingly from that point forward.

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Filter Work Orders by Technician

The Work Order List has a new option available in the “Options” menu called “Technician Filter”. If you turn this on, you’ll have a box at the bottom of your work order list. You can begin typing any part of a Technician ID into this box, and the list will change and only show you work orders that have a matching Technician.

Move-Out Due to Date-of-Death

Previously if you had a move-out due to the death of a sole member, you could manually do a termination 14 days after the date-of-death, and then do a move-out on the proper effective date. Some contract administrators didn’t like this, so modifications were made to handle this scenario without the termination.

Note: You are only allowed to claim subsidy for 14 days after the date-of-death and not all the way through the move-out date (when the unit was physically vacated).

Now when doing the move-out with the reason as the “Date-of-Death”, if the system sees that the date-of-death occurred outside of the 14-day assistance window, it automatically calculate the appropriate adjustments for the ledger. In addition, the appropriate request on your monthly voucher automatically occurs. The voucher makes sure to only request 14 days after the date of death, and ensures no further assistance is requested. Likewise, on the ledger, you only receive assistance for 14 days after the date-of-death. The remaining days (up to the effective move-out date) are charged to the tenant side at contract rent with no assistance.

Tax Credit TIC Updates

Updates were made to all of the state TIC forms to include wording for the new Tax Credit full-time student exemption of “Formerly in Foster Care”.

Ability to Designate Households to Different Set-Asides

You now have the ability to designate a household to a more-restrictive set-aside, after completing a certification. For instance: If you have someone qualify at 30%, but you have enough units at that set-aside, you can now choose to designate them at a more restrictive set-aside (i.e. 40%, 50%, 60%, etc) where you may need more units to meet that requirement.

Tax Credit Applicable/Target Fraction Monitoring

You now have 2 new company preference options that will allow you to turn on the applicable/target fraction monitoring during the certification/interview process. In the past, the system monitored them for you through the dashboard alerts and reporting, but you can now turn either/both of them on and enforce them during each individual certification. Turning on the first-year applicable fraction will create a mandatory check that must be passed when completing a certification. If you turn on the target fraction, it will be a non-mandatory check during certifications.

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Eligibility Codes for BMIR

HUD BMIR contracts do not require an eligibility code to be sent or appear on a 50059. However some contract administrators have requested the 50059 correctly report the number of eligible vs. non-eligible members. To meet this requirement, Management Plus now lets you specify the eligibility status of individual tenants during the certification process then uses this information when calculating the eligible vs. non-eligible members.

Background Screening Enhancements

Applicants and Checking Status

When running a “check status” on applicants with a pending/declined/approved with conditions status, larger lists were taking quite a while to query the statuses for all of the households. Three new options to check status have been added:

- All Households – This option performs the same status checks as Management Plus does today. It sends up all pending, declined, and approved with conditions households, and checks for a change in status.
- All Pending – This new option only sends up pending households to see if a status change occurred.
- Current Household – This new option only sends up the household you have highlighted in the list to check for a change in status.

Performance enhancements have been made around the Background Screening functionality in the applicant/waiting lists.

Rent-To-Income Calculations

A new option has been added to the applicant screening information screens in Management Plus. The option (“Do not report income for Section 8 voucher household”) only appears if you are using Tenant Voucher contracts in Management PLUS.

If you check this box, no annual income is sent up during the screen, and therefore no rent-to-income calculations or tests are run when screening a particular household.

For more information on our integrated Background Screening Service, please email: sales@domin-8.com .

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Electronic Payment Enhancements

In a previous release, Management Plus added support to electronically process recurring and one-time payments with ACH and check scanning. All payment information is automatically transferred between the web-based resident portal and the resident ledgers in the Management Plus system, keeping everything in sync and up-to-date for you. The v5.8 release has addressed some ePay issues raised by customers.

The Domin-8/Management Plus ePay is completely integrated, highly secure and designed for the unique challenges of property management. It will provide you with the ability to process resident payments faster thereby receiving funds faster, which in turn improves your cash flow. For more information on ePay please email Sales@domin-8.com. There are many other benefits which can be explained more fully if you are interested.

Some of the benefits of using Electronic Payments with Management PLUS are:

- Scans both checks and money orders
- Residents setup one-time or recurring ACH direct debit rent payments
- Allows you to charge/collect Convenience Fees for this service
- Minimizes errors and eliminates the need for trips to the bank
- Deposits the payment into your bank account, even if you have multiple banking relationships
- Improves cash flow by making funds available more quickly
- Requires 50% less work than bank solutions
- Rivals any secure solution in the market, and is SAS 70 Compliant
- Leverages an established system with 1000+ existing customers already processing 53+ million transactions a year
- Connects with little effort to most banks
- Is so easy to use, training can be completed in less than one hour

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Security

The v5.8 release involved extensive enhancements to Management Plus' security and control at the user level. You now have:

- Additional control to grant/revoke access to new areas of the system
- More control around how your users set-up and use passwords for greater security and password encryption
- Ability to lock down an entire company/database for a set amount of time

Note: You can not switch back and forth between 5.7 and 5.8 with the new security enhancements. If you are working in 5.7, and then run 5.8 against the same location (same system folder and data), as you log in as users it will clear your password from the old location, and encrypt it and put it in the new location. If you then switch back and run 5.7, you can't log in (because MP won't find a password on file).

<u>Password Security</u>

Password length has been increased from 11 to 20.

Password system preferences will now be available for both Central and Standard Security. System preferences include the following:

1. Enforce Minimum password length – If enabled, allows you to define the minimum length for a password your users can set.

2. Enforce maximum password age (in days) – If enabled, this setting allows you to define how long a user password is valid before the user is prompted to change it. When the users' password is 7 days from expiring, they will begin to receive notices letting them know that it needs to be changed.

3. Store and enforce duplicate password history – If enabled, this setting will track the last three passwords that have been used by each user, and will not allow users to reuse those passwords. This information is encrypted for security purposes.

4. Require Strong Passwords – Turning on this setting will ensure that your username, first name, or last name are NOT part of the password. User Matt Matthews with a username of "mmathews" cannot use passwords like "mmathews1234", "MATTMPW", "55mathews", etc. Additional functionality may also be turned on to further increase password strength:
   - Require at least one digit – Requires at least one digit, 0-9 somewhere in the password.
   - Require at least one symbol – Requires at least one character that is not 0-9, a-z, or A-Z somewhere in the password.
   - Require mixed case – Requires at least one character that is lower case alphanumeric, and one that is upper case alphanumeric.

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New Password Security Options
There are now two new areas that have added security control in the system. In the past, it was an all-or-nothing approach, in that you could either allow a user access to the area (which in turn granted full access), or you could completely shut them out of the area. With v5.8, you now have the ability to grant read/view access to the following areas:

1. Enter Cash Receipts & Enter Transactions now allows you to grant a user "view" access. Users are able to go into batches, open them, and look at the transactions/receipts in the batch, but are not able to modify/add/delete from them.

2. Certification processing (including the certification list in the lease list area) now allows you to grant a user "view" access. With view access, the user cannot perform any certification actions, but they are able to access the certification list to see the certifications, and perform any operation in regards to viewing data, or reporting on data in the system.

Permission and Access Control to Company Data
Management Plus v5.8 now allows administrators the ability to control when a full "lock" of company data happens. Administrators are able to "switch off" a company so that only they have viewing permissions. You have 2 types of locks available to you:

- Password security determines who has the ability to lock/unlock companies. It also has the ability to determine who has access to companies when they're locked. You may want to set up only certain users to be able to lock/unlock, but still have higher level staff access locked companies, while the other users remain locked out.

- Exclusive locks are available as well. If a user has the ability to lock/unlock a company, they can set either a basic lock or an exclusive lock on a company. If it's an exclusive lock, the user who sets the lock is the only user who can access the company. Basic locks allow other users (who have the password security to access a locked company) to still access the company with the right credentials.

- The ability to lock multiple companies at once (or unlock) can be done through a new tab in the Management Plus user monitor. It requires a username/password to complete the operation so that only users with the proper access can perform these functions.

- Additional features are also available when you are locking a company:
    - You have the ability to choose a basic lock vs. an exclusive lock.
    - You can type a lock comment that appears when a user tries to log into a company and is told it's locked.
    - You can choose to type an anticipated date/time when the company may be unlocked, which also appears in the message when an unauthorized user tries to access a locked company.

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Posting G/L

A change has been made to the "Post to Prior Period" security option. Previously, when you had a user who did not have access to post batches to prior periods, they were unable to post batches generated by the system with older dates. Now with v5.8, users without access to post to prior periods are able to post critical system/adjustment batches - regardless of whether or not they are dated in a prior month.

Posting Reports to Specified Locations

When printing reports you may now specify that you want to eliminate the mandatory page break between the posting report and distribution account breakdown pages. This enables sites to keep posting reports for smaller batches to one page.

Overriding of backup/report/document printing/posting report locations

There is a new area in which you can choose to specify an "override" path for your company backups, reports, document printing reports, and posting reports. Each of these four areas can have their own specified location. Previously with Management Plus, any user could specify where to save backups or reports.

Now with v5.8, you can control (via company preferences) whether or not you want your users to have the choice as to where these items are saved. If you want to control the location, you can specify the override path. When this is done, your users will now be required to save any backups and/or reports to your predefined locations. Users will not be able to change the path you specify. This feature enables you to keep all of these types of files in their own pre-defined locations, for each of your companies.

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Affordable Housing/Compliance

Tax Credit Tenant Income Certification State Form Updates
As a result of compliance changes in the industry, mainly in the area of identifying Head of Household and Full-Time Student Exemption Codes, several of the states have updated their Tenant Income Certification (TIC) forms. In order to remain in compliance with all of the regulations and state standards, you must support these new TICS. The following state TICs have been updated in Management Plus:

- California
- Florida
- Louisiana
- Maryland
- Massachusetts
- Mississippi
- Missouri
- North Carolina
- Ohio
- Oregon
- Pennsylvania
- Texas

Performance Enhancements to the Certification Review Screen/Processing
The review screen during the interview/certification process has been re-architected for accuracy and performance reasons. The result is that in v5.8 you get your compliance information at the end of an interview/certification far faster than you ever did before, without the wait times that came with large sites and/or deep layers of funding. A new file has been added in this release to speed up this process.

Note: The first time you open a company in 5.8, it may take a few minutes to populate this field, but it should not be necessary after that.

Recalculating 50059 Security Deposits
The subsidized contract information now allows you to indicate if you have a waiver that allows you to cap your security deposits at a defined dollar amount. You can now define a maximum security deposit to charge on that contract.

HUD Handbook Changes
Changes have been made to the HUD Handbook and those changes were implemented inside of Management Plus in v5.8:
- Lease terms now default to 365 days for HUD contracts.
- Clarifications were made as to income received thru divorce, annulment, or separation. For further details on HUD handbook changes please see your Handbook.

BIN Transfers
Security measures have been put in place so that unit transfers between different BINs involving tax credit, no longer let you scatter the effective dates on the transfers.

Previously, users were able to specify a different effective date of the transfer for each funding source, which led to unpredictable results.

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Report Enhancements

New Comprehensive Rent Roll Report
The v5.8 release introduces a new Rent Roll Report that is focused more on financials for customers doing Affordable Housing. It breaks out the information into several key sections consisting of:

- Summary Information – The unit number, unit status, days it was vacant in the current month, primary resident, unit size, square footage, and the current qualified rent designation.
- Potential Rents – Shows you all of the possible "potential" rents for the unit including ideal/market survey, HUD contract rent, your scheduled charges/lease rent, and your funding source (i.e. tax credit) restricted rent.
- Lost Rent calculation – Breaks out exactly what your gross potential is for the unit for the month, what you're currently billing in tenant/government assistance, and then the net you lost/gained for the month.
- Lost Rent Breakout – Will show you what portion of your vacancy loss is attributed to physical vacancy loss, and what portion is a gain/loss to lease.
- Balance Information – Shows you a summary of the current tenant ledger balance and security deposits on hand.
- Lease/Certification Information – Shows you the lease start/end dates of the households in that unit, as well as their last certification date.

Technician Report
The Technician Report has been modified to allow the user to specify whether they want to only print information for 'active' technicians or for all technicians (including inactive). Formerly, this report printed every technician that was in the system.

Traffic Report
You now have the ability to specify which of your Management PLUS users are considered "leasing agents". Because of this, you now have the option to print the Traffic Report for all of your users, or for "leasing agents" only.

Delinquency Report
The Delinquency Report setup screen now gives you the option to include the Lease Comment (that you have entered into the lease information for each household) on the delinquency report if you choose.

Management Fee Report
The Management Fee Report setup screen now has the option to print the report in summary or detail. It previously only printed in summary. The detail option will now print all supporting info beneath each property/building and give you detailed information on each charge code that counted towards the management fee.

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Work Orders

The capability has been added to allow you to mass-reassign work orders. This functionality will help if a Technician cannot complete their work orders or is absent for the day, as it will allow you to highlight any number of work orders and quickly reassign them to one or many technicians.

Cash Receipt Entry Screen

The household lookup in cash receipts entry now includes the "Lease End Date" field. The lack of the end date was causing some customers, particularly with Student Housing, problems. This was mainly seen when all lease start and end dates are around the same time of the year, and it was difficult to quickly determine if you had the right household when using the lookup.

Application & Wait List

The Application and Waiting Lists were overhauled for performance improvements, and will now refresh, scroll, and open much quicker than in prior versions.

Application & Wait List Audit and Tracking Reports

When printing an audit/tracking report, you now have the option to include data from both the application list and waiting list. This was problematic for people who had to print a tracking/audit report when the site utilized both lists in Management Plus. There is no longer the need to run the report for both lists and then merge them together outside of the system. The ability to track more comments has also been added. The user will be prompted to add them for inactivating households, accepting or declining offers, and move-ins. This will flow to the Audit and Tracking Report.

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System Requirements and Recommendations

The system specifications listed here are general guidelines. Other variables will also affect system performance, most importantly the other applications that are installed and running on the machines that use Management PLUS.

It is possible to run Management PLUS on a wireless network. Domin-8 is not responsible for data corruption or data loss that may arise due to lost connections, packet loss, or any other network issue that may result from problems with a wireless connection.

NOTE: When installing Management PLUS upgrades in a client/server environment, you *must* update both the server and all of the clients so that they are all running the same version of the software. Doing otherwise may cause unpredictable results.

If you have questions about system specifications, please contact the Sales Department at sales@domin-8.com.

Standalone Computer & Peer-to-Peer Server	Client
Dual Core processor or better	Dual Core processor or better
1 GB of RAM per concurrent user	1 GB of RAM
1 GB of hard disk space per company	500MB of hard disk space
Windows XP, Vista or Windows 7	Windows XP, Vista or Windows 7
Pervasive.SQL (see below)*	Pervasive.SQL (see below)*
Windows compatible laser or inkjet printer	Windows compatible laser or inkjet printer
CD-ROM drive	CD-ROM drive
TCP/IP network for multi-user operations	Internet connection**
Internet connection**	

Dedicated Database Server	Citrix or Terminal Server
Quad Core processor or better for 6+ users. Dual Core processor or better for 5 users or less.	Quad Core processor or better for 6+ users. Dual Core processor or better for 5 users or less.
1 GB of RAM per concurrent user (or 4GB)	Minimum of 4 GB of RAM or 1 GB per user
1 GB of hard disk space per company	1 GB of hard disk space
Windows Server 2003 or better	Windows Server 2003 or better
Pervasive.SQL (see below)*	Pervasive.SQL (see below)*
Windows compatible laser or inkjet printer	Windows compatible laser or inkjet printer
CD-ROM drive	CD-ROM drive
TCP/IP network for multi-user operations	Internet connection**
Internet connection**	*No more than 20 concurrent users per Citrix or terminal server*

* Pervasive Workgroup can be used in an environment with 5 computers or less (counting the database server). For more than 5 computers, a Pervasive Server license is required.

For Pervasive compatibility, please visit:
http://www.pervasivedb.com/Database/Products/PSQLv10/Pages/v10SystemRequirements.aspx
** An internet connection is required to download Management PLUS updates and to receive application support. TRACS users will need a high speed internet connection to submit files to iMAX.

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