

Transferring a Tenant

All properties are reporting on an annual basis. Your report date has been set and you were notified throughout the year. If you are not sure of your new reporting period, please contact our office at 406-841-2840 and ask to speak to Bob, Rena, or Todd.

*Remember you have to have a vacant unit in order to proceed.

*For COL purposes if a tenant is transferring between units, the dates must be the same.

* For COL purposes if one tenant is moving out and a tenant from a different unit is then transferring into that unit, the move-out date for the previous tenant needs to be a day earlier as the system will not allow for same day transfers. This will allow for all the paperwork for the transferring tenant to match.

After clicking on proceed to units; select the unit and click on Unit Transfer tab.

Unit transfer tab

1. *Building ID*: only need to change if transferring to a different building. (8609 should state whether you can complete a building to building transfer or not) **If line 8b says yes, check with your syndicator for permission to transfer between buildings.**
2. *Transfer Effective Date*: Date tenant transferring to unit
3. *Tenant Paid Rent*: If adjusted, update
4. *Mandatory Charges*: If adjusted, update
5. *Rental Subsidy*: If adjusted, update
 - a. If there is a notification of a future Section 8 rent change date, only enter if within the report period. **If falls outside the period DO NOT ENTER.** If the household was to vacate the unit you will not be able to delete it once it has been posted.
6. *Utility Allowance*: Does not need to be changed unless new amounts have been released. (It will update from the cert in the new unit.)

If transfer original household to wrong unit

1. Click on unit that tenant was previously occupying. Will show vacant now.
2. Click the delete tenant certs button
3. Click delete and it will place the tenant back into original unit

Then follow previous steps to transfer tenant to correct unit.

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Transfer with change in Household Composition

1. Complete the transfer to the new unit first
2. Refer to add new household instructions for tenant data entry help