Texas Department of Housing and Community Affairs
CMTS Unit Upload Instructions
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Section 1: Introduction

This document provides instructions for uploading household and tenant data to CMTS, using the CMTS Unit Upload feature in CMTS. The terms "tenant data" and "household member data" are synonymous, and both are used in this document.

Two comma-separated value (CSV) files are involved in data uploads to CMTS.

- The first is the Household file, which contains household-level information. This is data that is displayed on the **Household Information** section of the **Unit** screen. This data, such as Move In Date and Annual Income, applies to the entire household.

- The second is the Tenant file, which contains tenant-level information. This is data that is displayed on the **Household Members** section of the **Unit** screen. This data, such as First Name and DOB, applies to a specific person.

The file layouts, field definitions, and related instructions are contained in the CMTS Unit Upload Specification, which is located on the same web page (http://www.tdhca.state.tx.us/comp_reporting.htm) as the instructions you are reading.

As of the date the CMTS Unit Upload Instructions were written, three property management software vendors (RealPage, Simply Computer Software, and Yardi) will be providing features in their systems to extract household and tenant data in the two file formats. Properties that use other off-the-shelf or custom internal systems for managing property data can also follow the CMTS Unit Upload Specification to develop household and tenant data extract capabilities.

Important note about CSV files and Excel: If you open CSV files in Excel to view them prior to uploading them to CMTS, do **not** save them in Excel. The reason is that Excel automatically changes some values. For example, a unit number of '01-00' will be changed to 'Jan-00'. If for some reason you need to edit a CSV file prior to uploading it to CMTS, use a text editor like Notepad or Notepad++ instead of Excel. Use Excel only to view CSV files. For more on CSV files, read the Wikipedia page at https://en.wikipedia.org/wiki/Comma-separated_values.

Section 2: Using CMTS Unit Upload

The **Your Property Listings** screen in CMTS now includes two links to upload household and tenant data. Those links are labeled **Upload Unit Household Data** and **Upload Tenant Data**, as shown in the screenshot below.

Before uploading household and tenant data, the following items must first be completed:

1. The household and tenant files must be created, usually by extracting them from the property management system that you use and saving them to a location of your choice on your computer or local network.

2. Buildings and Units that correspond to the household and tenant data to be uploaded must first be created in CMTS. Use the **Add and Edit Buildings** and **Add and Edit Units** links to add and edit buildings and units. Those two links appear on the **Property Detail** screen, which is accessed by clicking the **Unit Status Report** link on the **Your Property Listings** screen. Refer to "Instructions for Adding Buildings and Units in CMTS" for more information.

In the following example household and tenant uploads, a test property (named Test Property) in TDHCA's test environment is used. It has two buildings and ten units which have already been created. To view the current household and tenant data for those ten units in this example, we click the **Enter Unit Occupancy** link on the **Property Detail** screen.

CMTS Property

mation | Enter Unit Occupancy | Print Unit Status Report | Subm
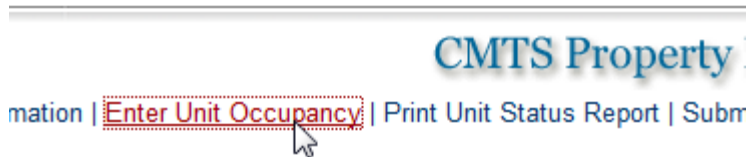
Clicking that link takes you to the **Unit Selection** screen.

CMTS Property Reporting System

Property Selection | Property details | Logout

Property#5166 Unit Selection

Building Search

Bin#		Bldg #	
		Search	

Search

Unit #	
Show All Units	Search

UNITS

Unit#	Bin#	Bldg#	Unit Type	Status
101	TX99887766	1	1 bdrm - 1 bath - 500 sqft	Vacant
102	TX99887766	1	1 bdrm - 1 bath - 500 sqft	Vacant
103	TX99887766	1	2 bdrm - 2 bath - 1000 sqft	Vacant
104	TX99887766	1	2 bdrm - 2 bath - 1000 sqft	Vacant
105	TX99887766	1	2 bdrm - 2 bath - 1000 sqft	Vacant
201	TX99998877	2	1 bdrm - 1 bath - 500 sqft	Vacant
202	TX99998877	2	1 bdrm - 1 bath - 500 sqft	Vacant
203	TX99998877	2	2 bdrm - 2 bath - 1000 sqft	Vacant
204	TX99998877	2	2 bdrm - 2 bath - 1000 sqft	Vacant
205	TX99998877	2	2 bdrm - 2 bath - 1000 sqft	Vacant

**Occupied units marked with asterisks are missing household member information. Either they do not have household member records or there is no designated Head of Household. You will not be able to submit the USR until all occupied units have complete records for each household member, and one household member must be designated as Head of Household for each unit.

The household and tenant data are currently blank for all units. The next screenshot shows the blank household and tenant data for unit 201, as an example.

Clicking **Exit** in the top right of the above screen takes you back to the **Unit Selection** screen, where you can click the **Property Selection** link to go back to the **Your Property Listings** screen. In the following example, one household and one tenant file will be uploaded for Test Property. The files in this example contain data only for unit 201, but when extracting actual files from your property management system, the files will most likely contain the household and tenant data for every unit in a property.

To upload a household file, click the **Upload Unit Household Data** link and then browse to the location on your computer or network where the household file is saved as shown in the next three screenshots.
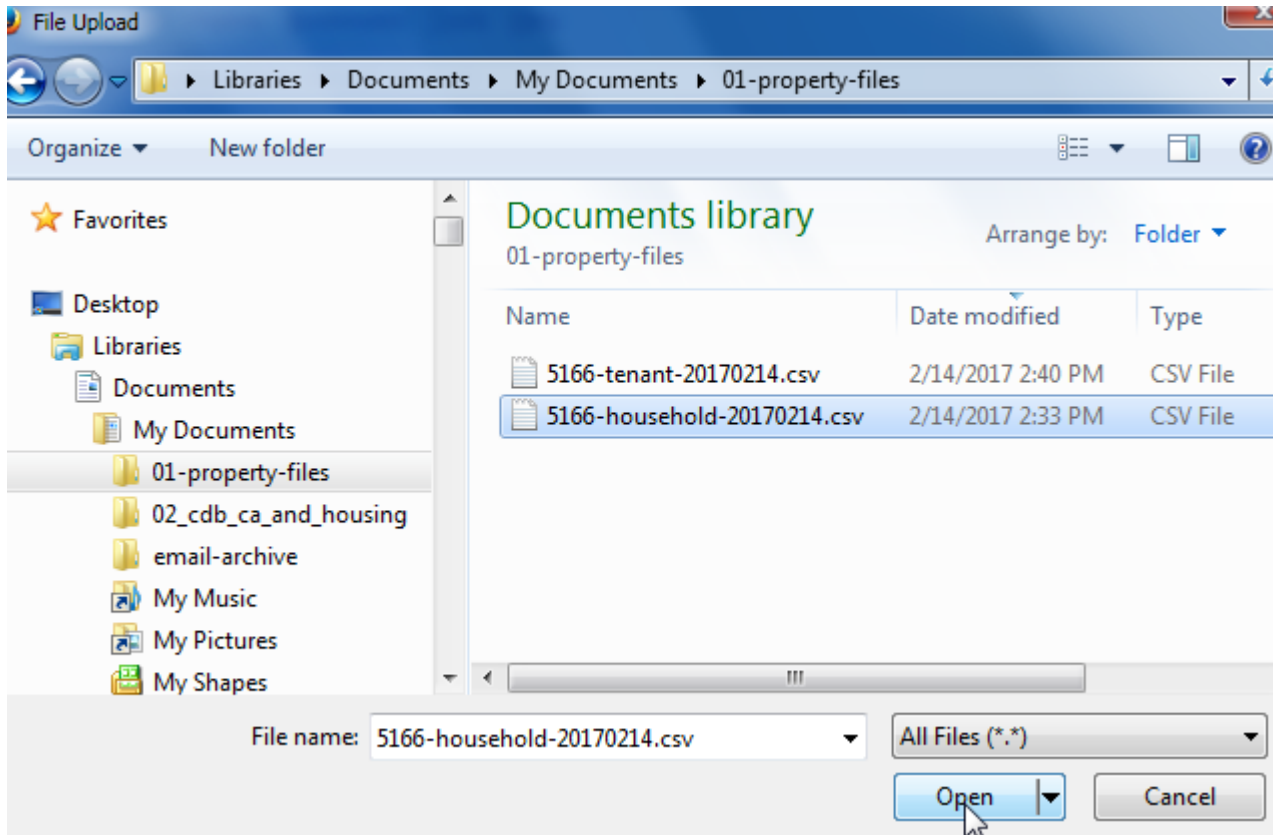
Your Property Listings

609 art II port	Unit Status Report	Update Contact Information	Edit Manager Password	Reports	Unit Data Upload	Tenant Data Upload	Electronic Document Attachment
Unit Status Report	Update Contact Information	Edit Manager's Password	Reports	Upload Unit Household Data	Upload Tenant Data	Attachments (0)

UPLOAD UNITS HOUSEHOLD DATA

Upload CSV File: Browse... No file selected. Upload

PROPERTY SELECTION

File Upload

Libraries ▸ Documents ▸ My Documents ▸ 01-property-files

Organize ▼   New folder

Favorites

Desktop
  Libraries
    Documents
      My Documents
        01-property-files
        02_cdb_ca_and_housing
        email-archive
        My Music
        My Pictures
        My Shapes

Documents library
01-property-files

Arrange by: Folder ▼

Name	Date modified	Type
5166-tenant-20170214.csv	2/14/2017 2:40 PM	CSV File
5166-household-20170214.csv	2/14/2017 2:33 PM	CSV File

File name: 5166-household-20170214.csv

All Files (*.*)

Open   Cancel

After selecting the household file to be uploaded, click the **Upload** button.
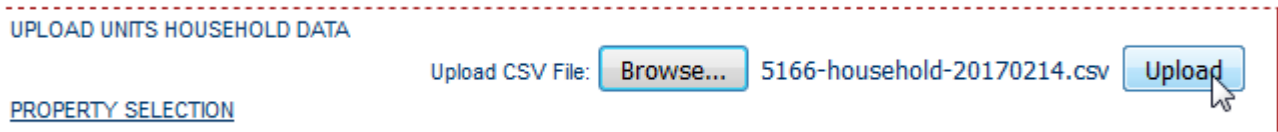
If there are no problems with the file, CMTS will display a green informational message that states **X result(s) uploaded**, where X is the number of records uploaded, as shown in the screenshot below. If there are problems, CMTS will display red error messages that indicate what needs to be corrected. No data will be uploaded until all problems are resolved. The error messages should be self-explanatory, but additional assistance is available in the HouseholdSpecification tab -- or TenantSpecification tab if uploading a tenant file -- of the CMTS Unit Upload Specification. Those two tabs include the data type, description, acceptable values, and required yes/no indicator for each field. Also, refer to Section 4 of this document for two examples of error messages.

To upload a tenant file, follow the above instructions, but click the **Upload Tenant Data** link instead and select a tenant file instead of a household file. In the sample screenshots below, the tenant file that is uploaded (5166-tenant-20170214.csv) contains two tenant records, also called household member records.
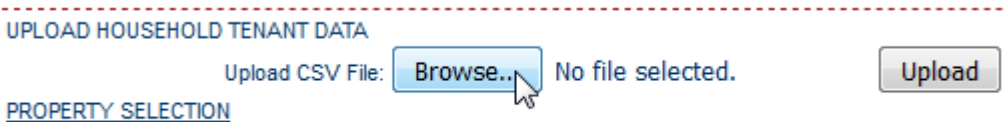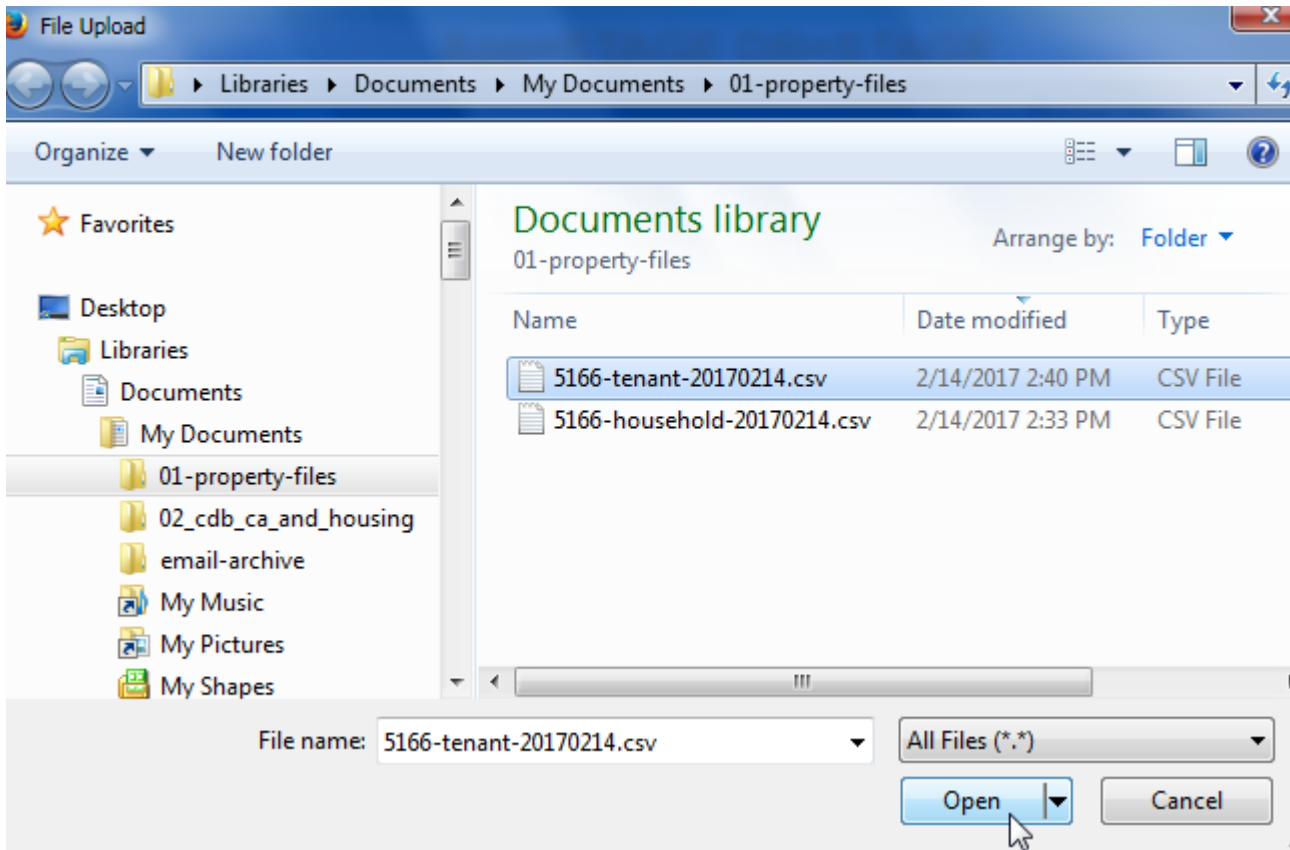
UPLOAD HOUSEHOLD TENANT DATA

Upload CSV File: Browse... 5166-tenant-20170214.csv Upload

PROPERTY SELECTION

- 2 result(s) uploaded

UPLOAD HOUSEHOLD TENANT DATA

PROPERTY SELECTION

Section 3: Viewing Uploaded Data

To view household and tenant data in CMTS after you upload it, click the **Enter Unit Occupancy** link on the **Property Detail** screen. (As stated on page 2, the **Property Detail** screen is accessed by clicking the **Unit Status Report** link on the **Your Property Listings** screen.)

Clicking the **Enter Unit Occupancy** link takes you to the **Unit Selection** screen.

**Occupied units marked with asterisks are missing household member information. Either they do not have household member records or there is no designated Head of Household. You will not be able to submit the USR until all occupied units have complete records for each household member, and one household member must be designated as Head of Household for each unit.

Because the two files uploaded in this example contain household and tenant data for unit 201, that data is now displayed on the **Unit** screen for unit 201.

The two screenshots below show the contents of the household file and tenant file that were uploaded. The example household file contains a header row and one row of data. If more household records were in that file, there would be another row for each additional household record.

The tenant file contains a header row and two rows of data (one row for each of the two household members shown in the screenshot above).

Screenshot of the example household file:

```
🖩 5166-household-20170214.csv

PropertyId,BuildingNbr,Bin,UnitNbr,HouseholdSize,MoveInDate,MoveOutDate,T
enantPaidRent,UtilityAllowance,AnnualIncome,RentAssistance,SourceofRentAs
sistance,TicEffectiveDate,Recertification,SpecialNeeds,UnitAccessibility1
Type,UnitAccessibility1Desc,UnitAccessibility2Type,UnitAccessibility2Desc
,BONDQual,BONDRentQual,HOMEQual,HOMERentQual,HTCEXQual,HTCEXRentQual,HTFQ
ual,HTFRentQual,LIHTCQual,LIHTCRentQual,NSPQual,NSPRentQual,TCAPQual,TCAP
RentQual
5166,2,TX88776655,201,2,20160101,,1000,,22000,10,4,,y,y,3,"Sample
comments.",3,,,,1,2,,,,,,,,,,,
```

Screenshot of the example tenant file:

```
🖩 5166-tenant-20170214.csv

PropertyID,BuildingNbr,Bin,UnitNbr,FirstName,LastName,MiddleInitial,Relation
shipToHOH,TenantRace1,TenantRace2,TenantRace3,TenantRace4,TenantRace5,Ethnic
ity,Disabled,DateOfBirth,StudentStatus,SSNLast4
5166,2,TX88776655,201,Andrew,Wiggin,,1,4g,,,,,3,2,19840106,2,0000
5166,2,TX88776655,201,Valentine,Wiggin,,4,4g,,,,,3,2,19850502,1,0000
```

The final screenshot shows part of the example tenant file, opened in Excel instead of a text editor.

	A	B	C	D	E	F	G	H	I	J	K
1	PropertyI	BuildingN	Bin	UnitNbr	FirstName	LastName	MiddleIni	Relationsl	TenantRad	TenantRad	Tenant
2	5166	2	TX8877665	201	Andrew	Wiggin		1	4g		
3	5166	2	TX8877665	201	Valentine	Wiggin		4	4g		

Section 4: Sample Error Messages

The following two examples demonstrate how to track down the cause of an error message in the household or tenant file that you are attempting to upload.

Example Household File Upload Error Message

In this example, the file 5166-household-20170214.csv has been edited to change the UnitNbr field from 201 to 211. Unit 211 does not exist in our example property. As shown on previous screenshots of the **Unit Selection** screen, the example property has ten units, numbered 101 through 105 and 201 through 205. When an upload of the edited 5166-household-20170214.csv file is attempted, the system does not accept the upload and returns the error messages shown in the screenshot below.

- Failed during household submission - Unit 211, BIN TX88776655, Bldg # 2 No matching unit found.

UPLOAD UNITS HOUSEHOLD DATA

The error message indicates that Unit 211, BIN TX88776655, Bldg # 2 is not a valid combination of unit, BIN, and building number. The next two screenshots show the file in a text editor (first screenshot) and Excel (second screenshot). The problem value is selected in both screenshots. The file contains a unit number of 211, which does not exist in CMTS for BIN TX88776655, Bldg # 2.

5166-household-20170214.csv

```
PropertyId,BuildingNbr,Bin,UnitNbr,HouseholdSize,MoveInDate,MoveOutDate,TenantPaidRent,UtilityAllowanc
e,AnnualIncome,RentAssistance,SourceofRentAssistance,TicEffectiveDate,Recertification,SpecialNeeds,Uni
tAccessibility1Type,UnitAccessibility1Desc,UnitAccessibility2Type,UnitAccessibility2Desc,BONDQual,BOND
RentQual,HOMEQual,HOMERentQual,HTCEXQual,HTCEXRentQual,HTFQual,HTFRentQual,LIHTCQual,LIHTCRentQual,NSP
Qual,NSPRentQual,TCAPQual,TCAPRentQual
5166,2,TX88776655,211,2,20160101,,1000,,22000,10,4,,y,y,3,"Sample comments.",3,,,1,2,,,,,,,,,,,
```

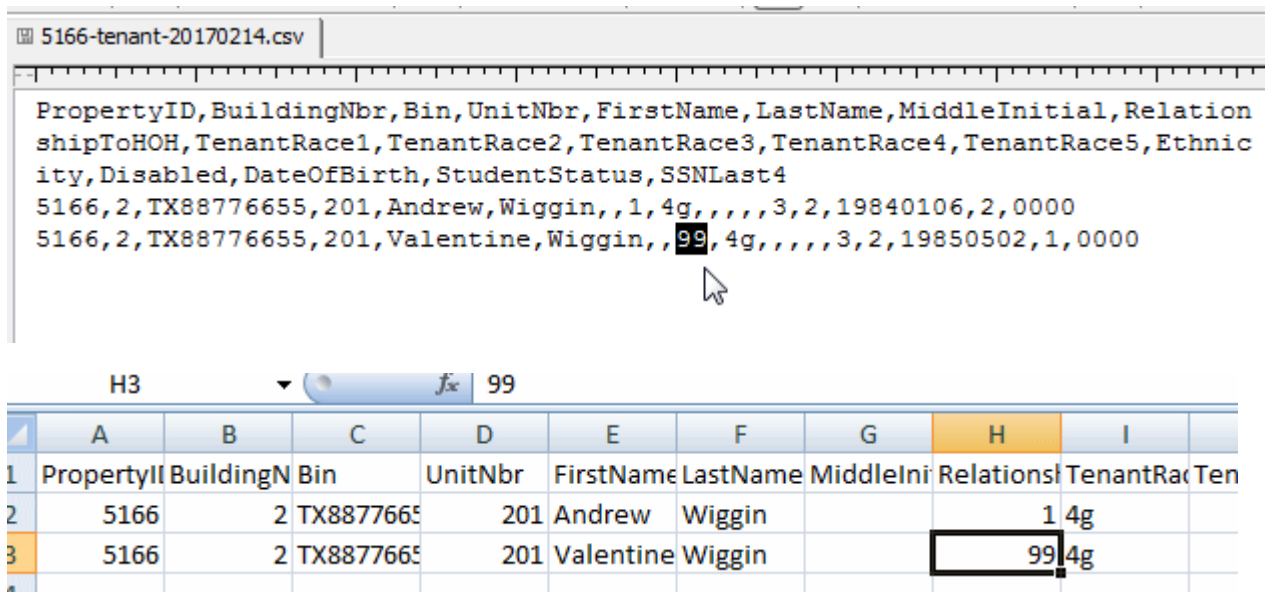|	A	B	C	D	E	F	G	H	I	J
1	PropertyI	BuildingN	Bin	UnitNbr	Househol	MoveInDa	MoveOutl	TenantPai	UtilityAllc	AnnualIi
2	5166	2	TX887766	211	2	20160101		1000		2200

Example Tenant File Upload Error Message

In this example, the file 5166-tenant-20170214.csv has been edited to insert an invalid value for the RelationshipToHOH field. When an upload of that file is attempted, the system does not accept the upload and returns the error messages shown in the screenshot below.

- Relationship entry error, please correct: Unit 201 Property 5166.
- Error in line# 2. Upload Not Saved because of Invalid Data. Correct Data File and upload again.
- -
UPLOAD HOUSEHOLD TENANT DATA

The error messages indicate that there is a problem with Unit 201 of Property 5166, and that the problem is invalid data in the second row of data in the file. The next two screenshots show the file in a text editor (first screenshot) and Excel (second screenshot). The problem value is selected in both screenshots.

5166-tenant-20170214.csv

```
PropertyID,BuildingNbr,Bin,UnitNbr,FirstName,LastName,MiddleInitial,Relation
shipToHOH,TenantRace1,TenantRace2,TenantRace3,TenantRace4,TenantRace5,Ethnic
ity,Disabled,DateOfBirth,StudentStatus,SSNLast4
5166,2,TX88776655,201,Andrew,Wiggin,,1,4g,,,,,3,2,19840106,2,0000
5166,2,TX88776655,201,Valentine,Wiggin,,99,4g,,,,,3,2,19850502,1,0000
```

H3   fx   99

	A	B	C	D	E	F	G	H	I
1	PropertyI	BuildingN	Bin	UnitNbr	FirstName	LastName	MiddleIni	Relationsl	TenantRac Ten
2	5166	2	TX8877665	201	Andrew	Wiggin		1	4g
3	5166	2	TX8877665	201	Valentine	Wiggin		99	4g

The TenantSpecification tab of the CMTS Unit Specification lists the valid values for RelationshipToHOH, which are the following:

1 = Head of Household
2 = Spouse
3 = Adult Co-Tenant
4 = Other Family Member
5 = Child (including unborn child of pregnant household member)
6 = Foster Child or Foster Adult
7 = Live In CareTaker
8 = None of the Above

As shown in the above screenshots, the second row of data contains a value of 99 for RelationshipToHOH, which is not allowed. The value for that field must be between 1 and 8.