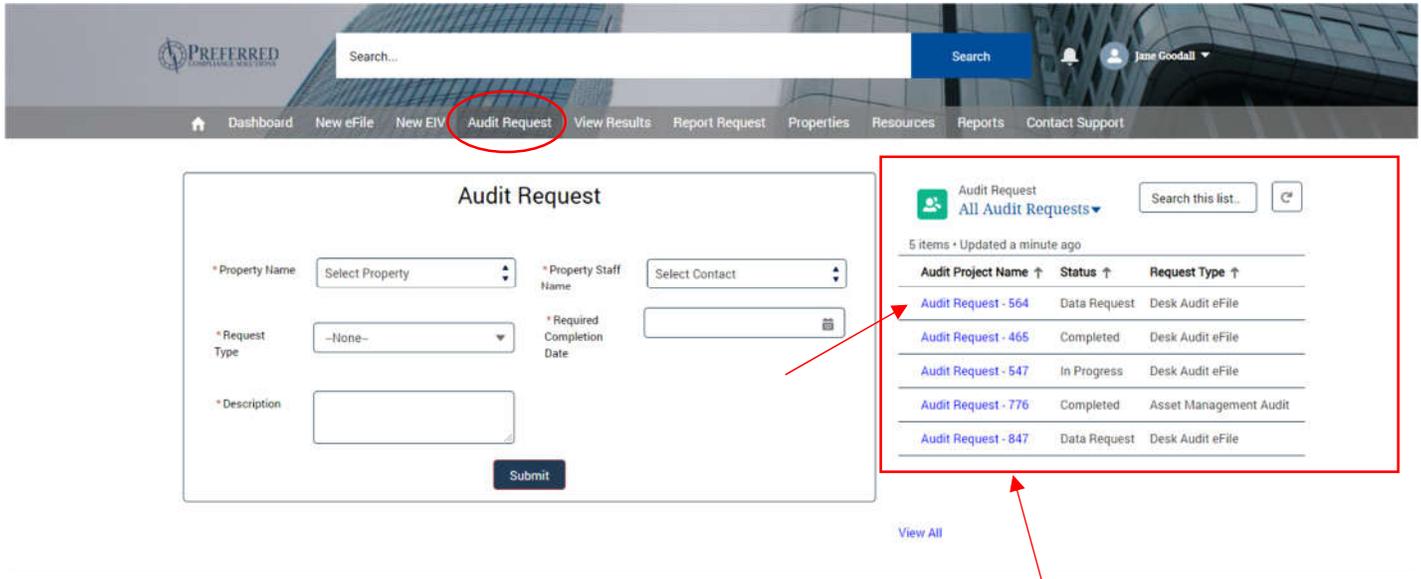


NextGen efile Access – How To Upload Desk Audit Files

STEP 1: Start on the “Audit Request” tab of the website. Click the blue Audit Request number on the right-hand side of the page to be taken to the Audit Project page.



Audit Request

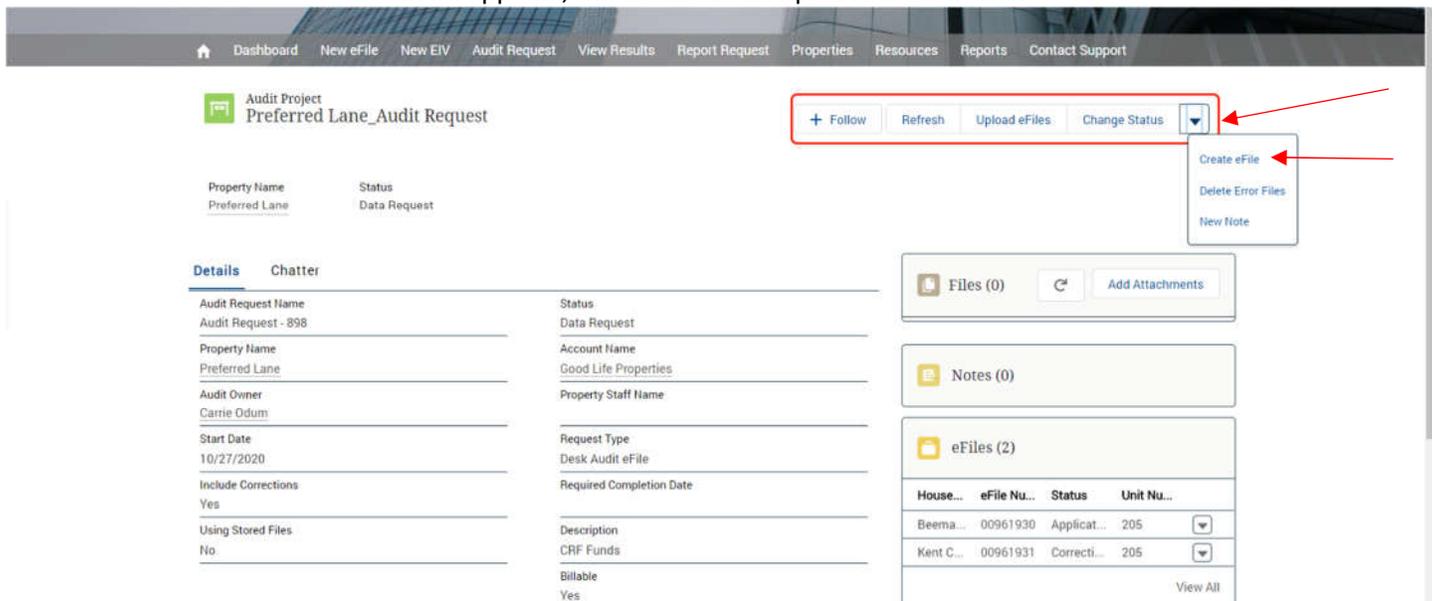
Property Name: Select Property | Property Staff Name: Select Contact
 Request Type: -None- | Required Completion Date:
 Description:

All Audit Requests

Audit Project Name ↑	Status ↑	Request Type ↑
Audit Request - 564	Data Request	Desk Audit eFile
Audit Request - 465	Completed	Desk Audit eFile
Audit Request - 547	In Progress	Desk Audit eFile
Audit Request - 776	Completed	Asset Management Audit
Audit Request - 847	Data Request	Desk Audit eFile

[View All](#)

STEP 2: To upload files one at a time use the down arrow on the right-hand side of the screen to select the “Create eFile” option. (to learn how to upload multiple files at a time, go to STEP 3). Enter the household name and unit #, then click “submit.” Click “Upload Files” and choose the desired file from your computer and click “Open.” When a green check mark appears, the file has been uploaded. Click “Next”



Audit Project
Preferred Lane_Audit Request

Property Name: Preferred Lane | Status: Data Request

Details | Chatter

Audit Request Name: Audit Request - 898 | Status: Data Request
 Property Name: Preferred Lane | Account Name: Good Life Properties
 Audit Owner: Carrie Odum | Property Staff Name:
 Start Date: 10/27/2020 | Request Type: Desk Audit eFile
 Include Corrections: Yes | Required Completion Date:
 Using Stored Files: No | Description: CRF Funds
 Billable: Yes

Files (0) | Add Attachments

Notes (0)

eFiles (2)

House...	eFile Nu...	Status	Unit Nu...
Beema...	00961930	Applicat...	205
Kent C...	00961931	Correcti...	205

[View All](#)

Create eFile

Household Name (Last First) * Unit Number

Audit Project Preferred Lane_Aud

Property Name Preferred Lane Status Data Req

Details Chatter

Audit Request Name Audit Request - 898

Property Name Preferred Lane

Audit Owner Camie Odum

Start Date 10/27/2020

Include Corrections Yes

Using Stored Files No

Attach Files

Note: Please don't use following characters in the file name:

! " # \$ % & ' () * + , - . / : ; < = > ? @ [\] ^ _ ` { | } ~

Step 2 - Upload

or drop files

Open

This PC > Downloads

Organize New folder

- Desktop
- Downloads
- Documents
- Pictures
- 14.0
- Adobe Premiere
- NextGen
- PCS
- Tutorials
- OneDrive
- This PC

- Layouts
- Adobe Premiere Elements Auto-Save
- Encoded Files

Last week (5)

- June_MLAR Tics
- June_MLAR Activity Report
- June Corrections
- Kent_Clark_202
- 5f32c5726834d02837f5188f_How To Upload D...
- 5f32c5726834d02837f5188f_How To Upload D...
- 5ef0e9681a77b63656ad7f0e_Desk Audit Files- ...
- How To Upload a File
- How To Upload a Correction Request

File name: Kent_Clark_202

Custom Files

Upload Files

 Kent_Clark_202.pdf 30 KB

1 of 1 file uploaded

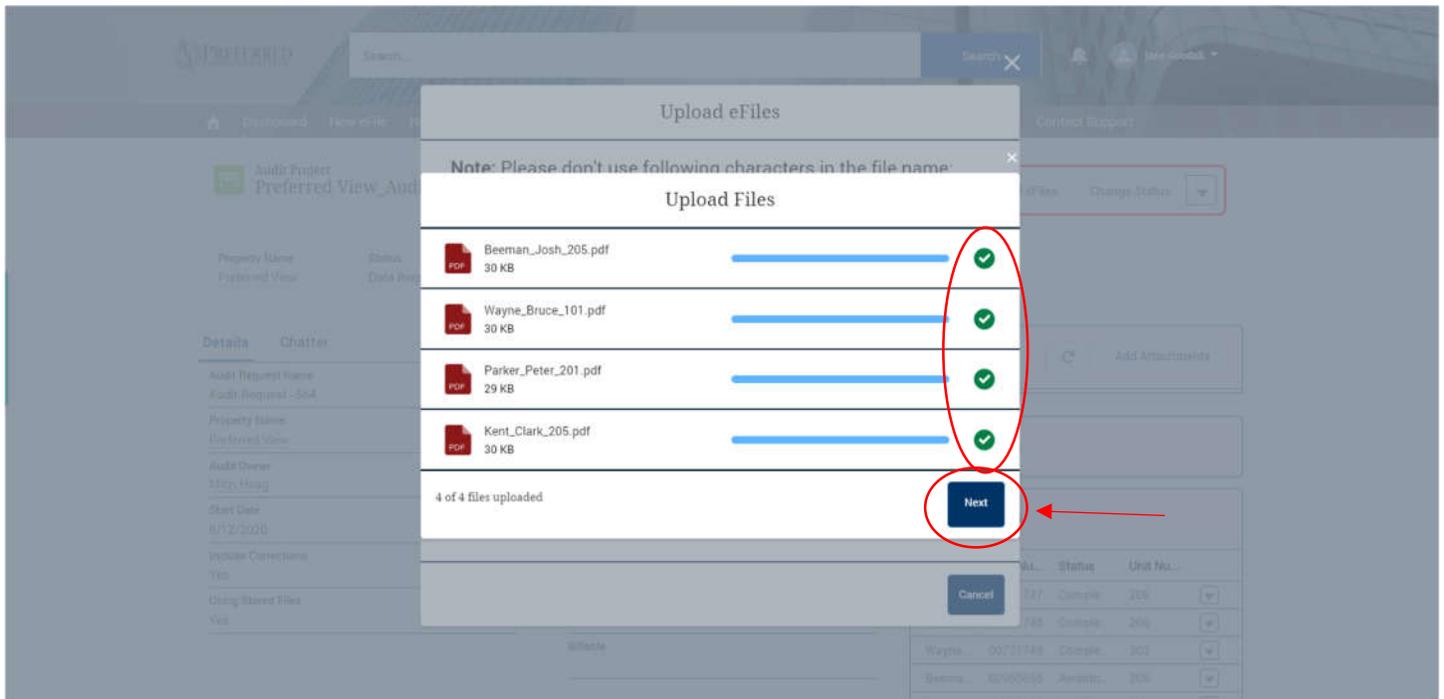
STEP 3: To upload multiple files at a time (up to 20), click the "Upload eFiles" button.

The screenshot shows the Preferred eFile system interface. At the top, there is a search bar and a navigation menu with items like Dashboard, New eFile, New EIV, Audit Request, View Results, Report Request, Properties, Resources, Reports, and Contact Support. The main content area displays an 'Audit Project Preferred View_Audit Request' with a table of property details. A red box highlights the '+ Follow', 'Refresh', 'Upload eFiles', and 'Change Status' buttons. A red arrow points to the 'Upload eFiles' button. Below this, there are sections for 'Files (0)', 'Notes (0)', and 'eFiles (6+)'. The 'eFiles (6+)' section contains a table with columns: House..., eFile Nu..., Status, and Unit Nu... The table lists several eFiles with their respective details.

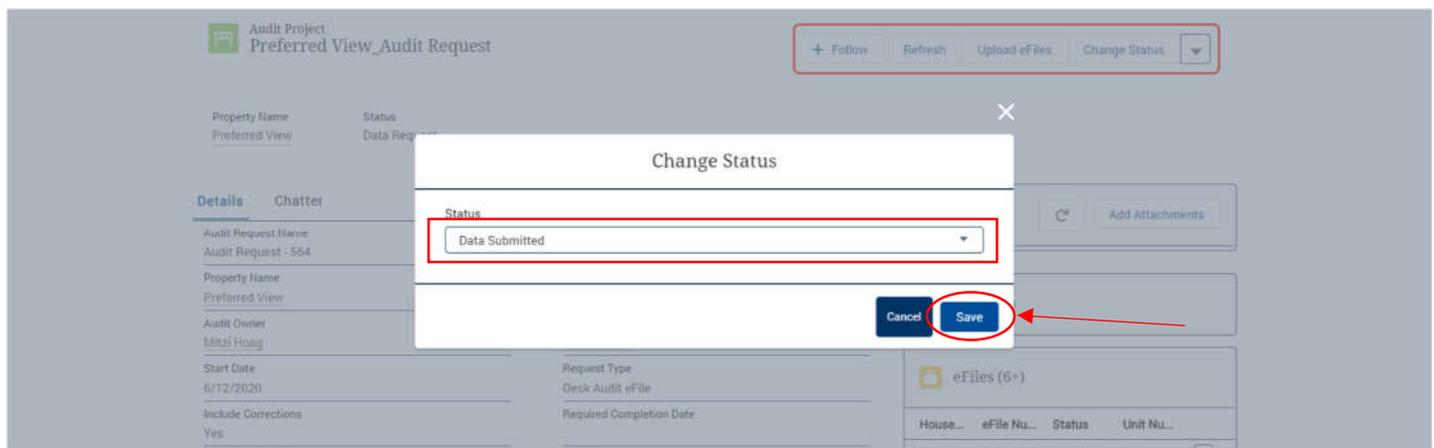
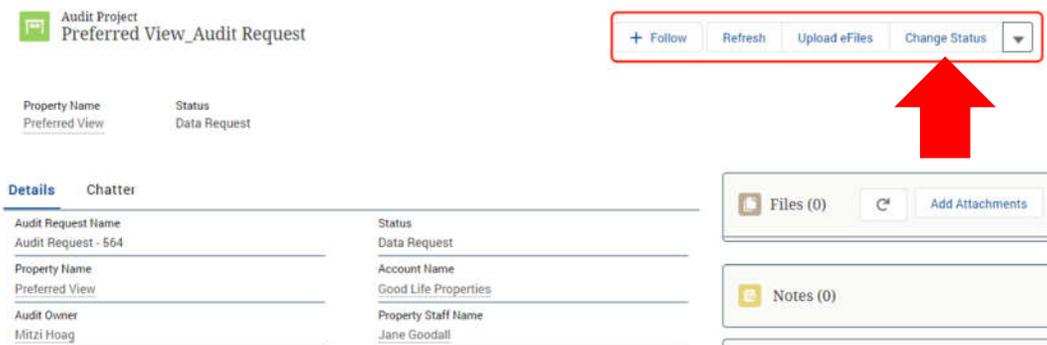
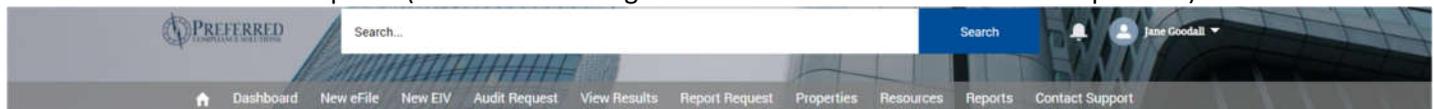
House...	eFile Nu...	Status	Unit Nu...
Beema...	00731747	Comple...	205
Smith ...	00731748	Comple...	206
Wayne...	00731749	Comple...	303
Beema...	00960656	Awaitin...	205
Beema...	00960658	Awaitin...	205

STEP 5: Click the "Upload Files" button or the "drop files" button. Click and drag your cursor over the desired file names to select multiple files at the same time. **IMPORTANT: When uploading multiple files at once make sure they are labeled in the following format "lastname_firstname_bldgunitnumber."** If they are uploaded in a different format, they will not upload properly. Click the "Open" button to add all highlighted files. When the green check marks appear, the files have been uploaded. Click the "Next" button.

The screenshot shows the 'Upload eFiles' dialog box with a file explorer window open. The file explorer shows the 'Downloads' folder with several files selected, including 'Beeman_Josh_205', 'Wayne_Bruce_101', 'Parker_Peter_201', and 'Kent_Clark_205'. A red box highlights these files, and a red arrow points to them. The 'File name' field at the bottom of the dialog box contains the text: "Wayne_Bruce_101" "Parker_Peter_201" "Kent_Clark_205" "Beema...". The 'Open' button is highlighted with a red circle and a red arrow.



STEP 6: To notify Preferred Compliance that all files have been uploaded and are ready for review, click the “Change Status” button. A drop-down menu will appear. Select the “Data Submitted” button and then click “Save” to save the status update (Note: Status change is not needed if additional files are uploaded).



STEP 7: If the Desk Audit requires additional documents such as Utility Allowance or Rent limit documents, mark the "Add Attachment" button on the "Files" section. **NOTE: Do not upload Desk Audit files here. This section is for additional documentation only.**



Audit Project
Preferred View_Audit Request

+ Follow Refresh Upload eFiles Change Status

Property Name Preferred View
Status Data Request

Details Chatter

Audit Request Name
Audit Request - 564
Property Name
Preferred View
Audit Owner
Mitzi Hoag
Start Date
6/12/2020
Include Corrections
Yes
Using Stored Files
Yes

Status
Data Request
Account Name
Good Life Properties
Property Staff Name
Jane Goodall
Request Type
Desk Audit eFile
Required Completion Date
Description
Billable

Files (0) Add Attachments



Notes (0)

eFiles (6+)

House...	eFile Nu...	Status	Unit Nu...
Beema...	00731747	Comple...	205
Smith ...	00731748	Comple...	206
Wayne...	00731749	Comple...	303
Beema...	00960656	Awaitin...	205
Beema...	00960658	Awaitin...	205

