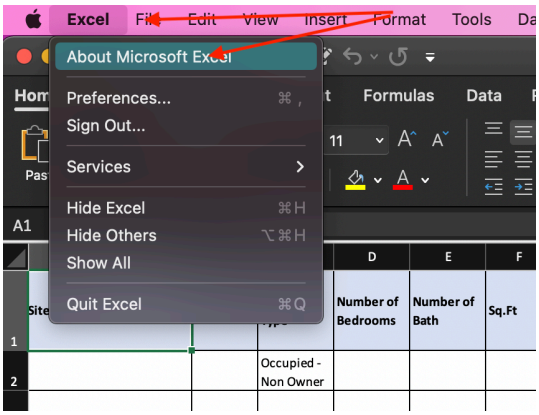
User Guide: How To Use The Rent Board's Excel Template

This document will explain how to use the Rent Board's Excel Template to import information for multiple units into the Housing Inventory Portal.

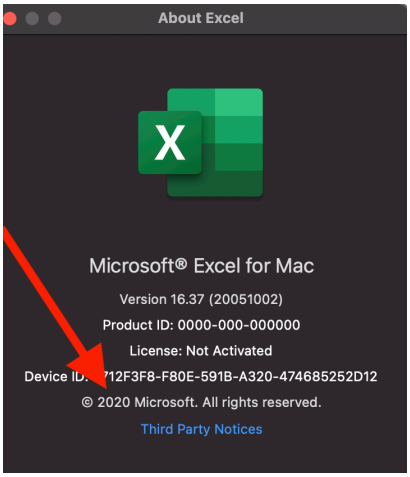
The Rent Board's Excel Template is only available for properties with 5 or more units. The template is not recommended for users who are unfamiliar with Microsoft Excel, or for properties containing a small number of units. Instead, we recommend using the "Individual Unit" submission form on the Rent Board's Portal instead.

STEP 1: Determine if you have the correct version of Microsoft Excel on your device

At this time, the Rent Board's Excel Template is only compatible with Microsoft Excel version 2013 or later, and cannot be used with other types of spreadsheet applications such as *Numbers for Mac* or *Google Sheets*. If you have Microsoft Excel on your device, but are unsure which version you have, open the application and click on the "Excel" drop-down in the top left-hand corner of the window. Next, select "About Microsoft Exel"



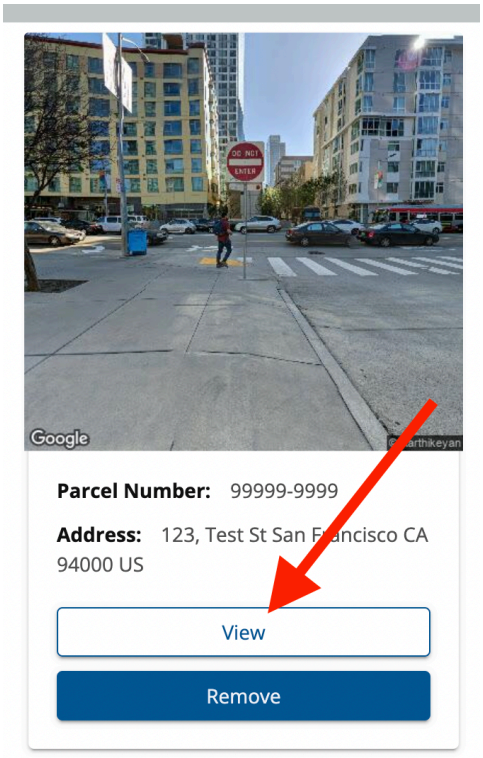
A new pop-up window should appear that describes which version of Microsoft Excel you are using (look for a date, e.g. 2013)



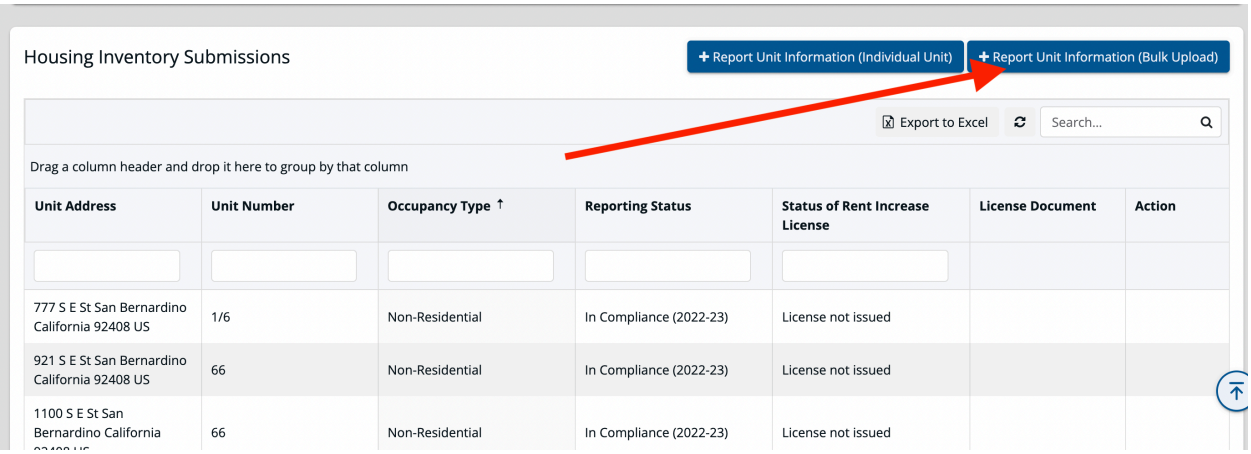
If this date is prior to 2013, please download a more recent version of Microsoft Excel before proceeding with these instructions.

STEP 2: Download the Rent Board's Excel Template

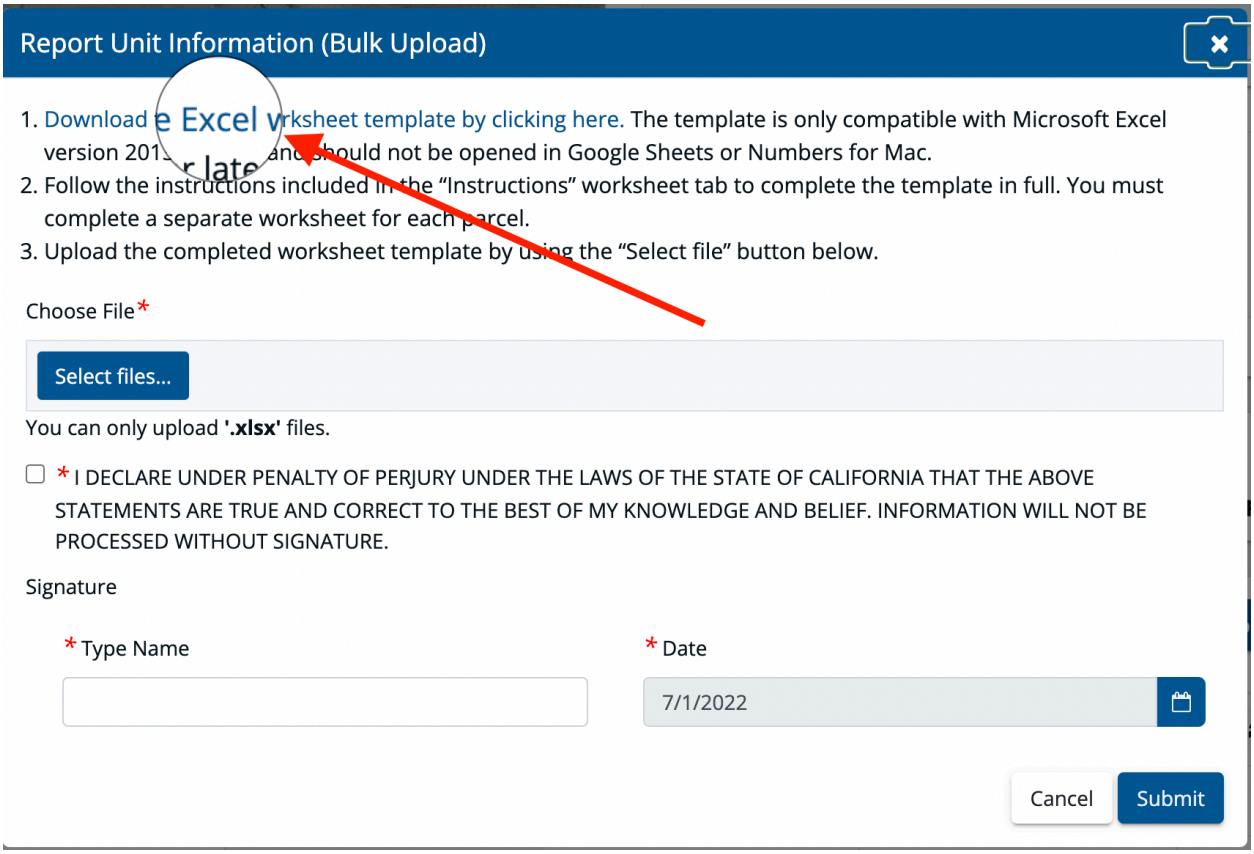
After registering an account with the Portal and adding a property to your dashboard (instructions not covered here), select the property where you want to submit Housing Inventory information by clicking "View":



Selecting "View" will open the Property Detail Page. From there, navigate to the blue button titled: **+ Report Unit Information (Bulk Upload)**

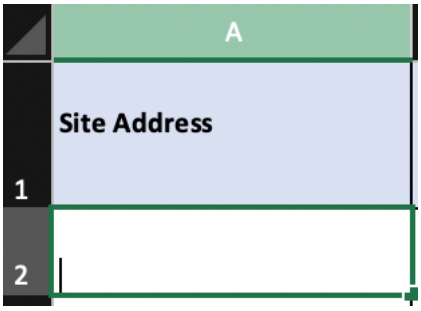


Download the Excel template from the pop-up screen shown below and keep track of where the document is saved on your device.



STEP 3: Complete the Excel Spreadsheet

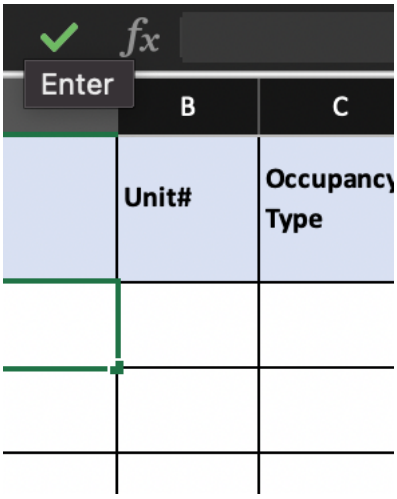
Column A



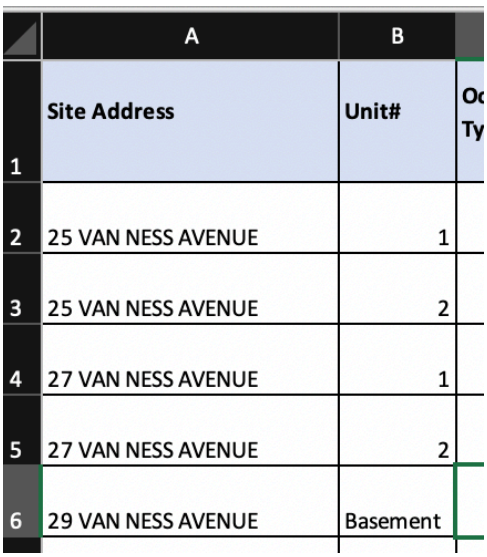
The “Site Address” is the Street number and Street name of the subject unit (for example “25 VAN NESS AVENUE”). The Site Address *should not include the unit number*, which belongs in the next column. You do not need to include the City, State, or Zip Code in the site address column.

If the building has only one site address, then enter that site address the same way on each line of column A. However, if the building has multiple site addresses (e.g. 25-35 Van Ness Avenue), adjust the site address as needed.

Column B



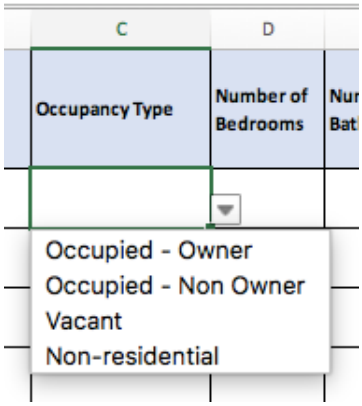
Enter unit #s here. If there is no unit number, simply leave this column blank. Here’s an example for a fictional building located at 25-29 Van Ness Avenue:



	A	B	
1	Site Address	Unit#	Oc Ty
2	25 VAN NESS AVENUE	1	
3	25 VAN NESS AVENUE	2	
4	27 VAN NESS AVENUE	1	
5	27 VAN NESS AVENUE	2	
6	29 VAN NESS AVENUE	Basement	

NOTE THAT YOU MUST COMPLETE A SEPARATE EXCEL SPREADSHEET FOR UNITS IN DIFFERENT BUILDINGS OR WITH SEPARATE APN# (ASSESSOR PARCEL NUMBERS). IF IN DOUBT, PREPARE SEPARATE SPREADSHEETS AND UPLOAD SEPARATELY.

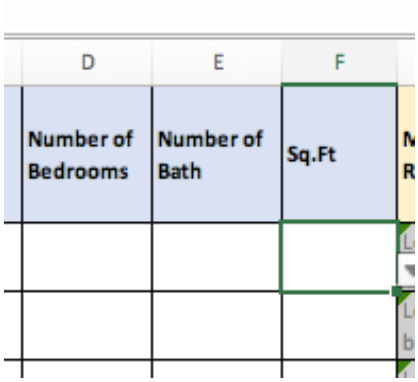
Column C



In Column C, you <u>must</u> select an "Occupancy Type" for each unit.

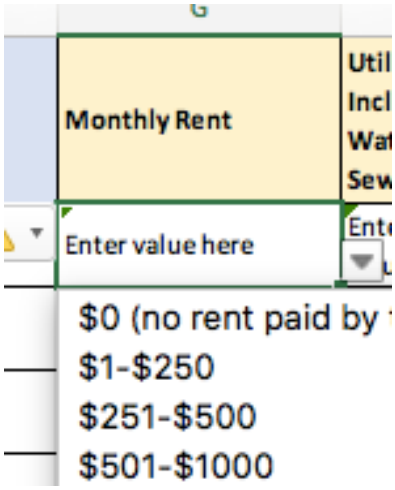
- **<u>Occupied – Owner</u>**: Select if the unit is occupied by an owner of the property on a full-time or part-time basis and is not rented at any time
- **<u>Occupied – Non Owner</u>**: Select if the unit is occupied, but not by the owner (e.g. a tenant, guest, or family member of the owner)
- **<u>Vacant</u>**: Select if the unit is currently vacant
- **<u>Non-Residential</u>**: Select if the unit is not legally authorized *or used* for any residential purpose (e.g. a restaurant or retail business)

Columns D-F



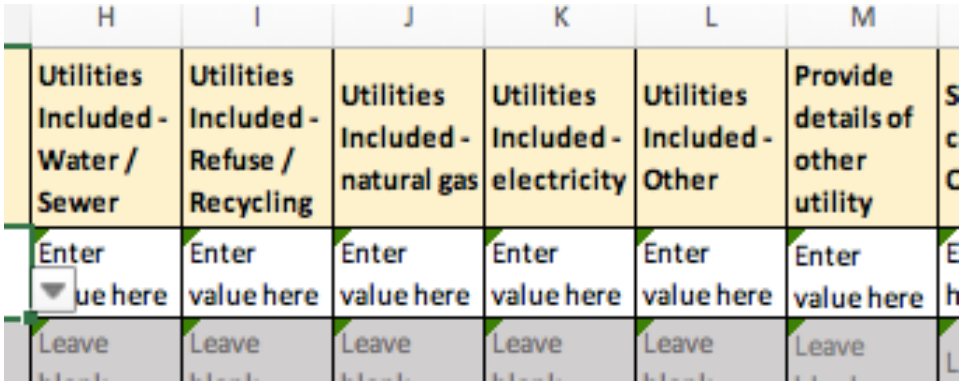
In columns D-F, click on the drop-down menus within each cell and select the applicable number of bedrooms, bathrooms, and square footage for each unit. If any of these values are unknown, please estimate to the best of your knowledge.

Column G



In Column G, enter the approximate monthly "base" rent for each unit by selecting the applicable $250 category in the drop-down. Base rent is the monthly rent paid by the tenant for all housing and housing services provided by the landlord, but does not include any temporary or fluctuating charges or passthroughs authorized by the Rent Ordinance.

Columns H-M



If any utilities are included in the tenant's base rent, please indicate so by selecting "yes" from the drop-down menus. If utilities are not included, select "no" from the drop-down menus. If some other type of utility is included in the tenant's rent that is not described here, select "yes" in Column L, and use Column M to describe that utility (e.g. internet, cable television).

Columns N-M

N	O
Start date of current Occupancy	Start Date of vacancy
Enter value here	Leave blank

For units occupied by a non-owner, enter the start date of the current occupancy. The date should be entered in mm/dd/yy format. For example, if the current occupant moved in on July 1, 2015, enter “07/01/15”.

For units that are currently vacant, enter the date (using the mm/dd/yy format) when the unit became vacant.

If the exact date when the unit became occupied or vacant is unknown, please estimate to the best of your ability.

Columns P-X

P	Q	R	S	T	U	V	W	X
Past Occupancy 1 - From (mm/dd/yyyy)	Past Occupancy 1 - To (mm/dd/yyyy)	Past Occupancy 1 - Occupied or vacant	Past Occupancy 2 - From (mm/dd/yyyy)	Past Occupancy 2 - To (mm/dd/yyyy)	Past Occupancy 2 - Occupied or vacant	Past Occupancy 3 - From (mm/dd/yyyy)	Past Occupancy 3 - To (mm/dd/yyyy)	Past Occupancy 3 - Occupied or vacant
Enter value here, if applicable	Enter value here, if applicable	Enter value here, if applicable	Enter value here, if applicable	Enter value here, if applicable	Enter value here, if applicable	Enter value here, if applicable	Enter value here, if applicable	Enter value here, if applicable

Columns P-X should only be completed if the current occupancy or vacancy began within the past twelve months. For example, if the unit is currently occupied by someone who moved in on 01/01/18, you would leave columns P-X blank. However, if the unit is currently vacant but a tenant moved out two month ago, you would enter the dates that the prior tenancy began and ended in columns P-Q and select “Occupied” in Column R. If there were additional occupancies or vacancies within the prior 12 months, enter them in Columns S-X, as needed.

Columns Y - AD

Y	Z	AA	AB	AC	AD
Business Contact	Registration Number(if any)	First Name	Last Name	Email	Phone

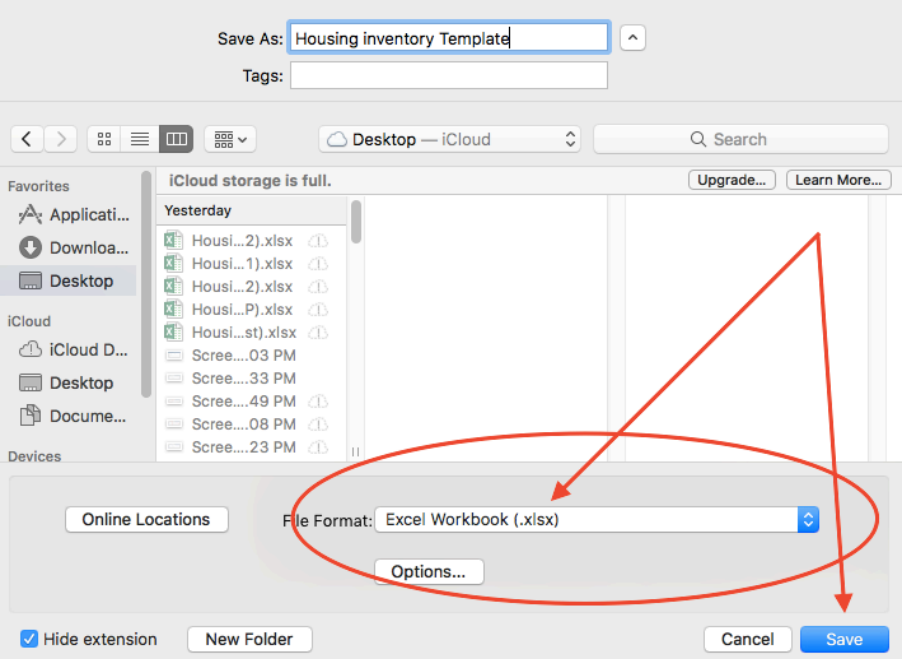
In Column Y, use the drop-down to select the role of the “Business Contact” associated with the unit (e.g. Owner, Property Manager, etc).

If the units have business registration numbers with the San Francisco Treasurer and Tax Collector, enter it in Column Z. If not, leave Column Z blank.

In Columns AA – AD, enter the name and email and/or phone number for the owner’s Business Contact for the unit. These fields must be completed for each unit, even if every unit in the template has the same Business Contact.

STEP 4: Save Your Completed Excel Spreadsheet (.xlsx files only)

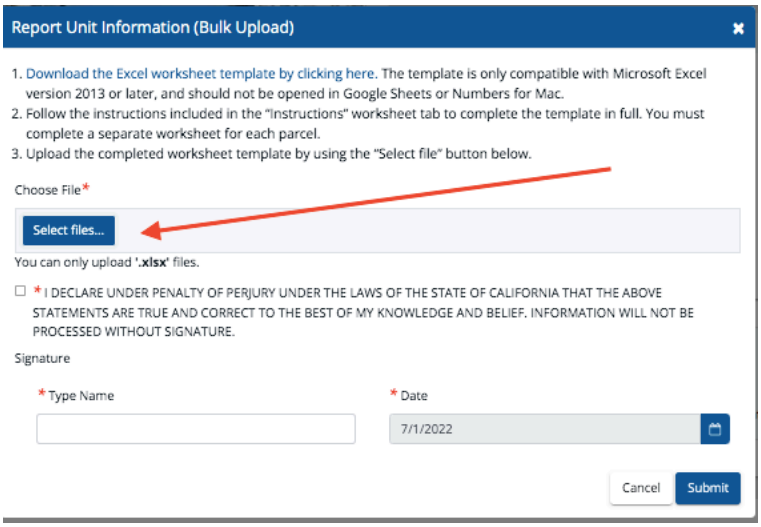
Before saving, please check your spreadsheet for errors and ensure no columns have been skipped or deleted (even if a particular column is not applicable to your building, it should never be deleted from the excel template). Once confirmed, save the Excel template as an **.xlsx file** on your device.



STEP 5: Upload Your Spreadsheet to the Portal

Upload your Excel spreadsheet to the Portal by returning to the

button and selecting the file you want to upload from your device. After selecting your spreadsheet, sign the declaration and click "Submit".



Note that once your import has been submitted, it may take several minutes to appear in the Portal, depending on how large the file is and the speed of your internet connection. You may need to refresh your screen for the upload to appear.

If you need further assistance, please contact the Rent Board's phone counseling line at 415-252-4600.