

Using CPI Increases in eSite

Software Name:	AMSI Evolution Suite™
Software Version:	7.5.3
Date:	October 2013
Description:	This document provides instructions for using CPI Increases in eSite.

Table of Contents

Introduction	2
CPI Group Codes	3
CPI Group Codes Grid.....	3
CPI Group Code Tab	4
To Add a CPI Group Code.....	4
To Edit a CPI Group Code.....	4
To Delete a CPI Group Code.....	4
To Print a List of all CPI Group Codes for the Property.....	4
CPI Tables.....	5
CPI Tables Grid	5
CPI Tables Tab.....	6
To Add a CPI Table	6
To Edit a CPI Table.....	7
To Delete a CPI Table	7
To Display and Print a CPI Table Listing.....	7
CPI Increase Detail.....	8
CPI Increases Setup Tab.....	8
CPI Increase Detail Tab.....	10
To Add a CPI Increase.....	11
To Edit a CPI Increase.....	11
To Delete a CPI Increase.....	11
CPI Calculations	12
CPI Calculations Tab	12
To Calculate CPI and Print Statements.....	14
Example	15
Setup:	15
Calculations:	17
Frequently Asked Questions/Troubleshooting	19

Introduction

The Rebillings option (available from the Setup—Rebillings menu) enables you to set up rebillings for commercial properties. Commercial properties are those with a property type of *6-Standard Commercial*.

CPI Escalations in the Commercial Management environment refer to increasing (or decreasing) certain tenant recurring charges based on charges in the Consumer Price Index (CPI) published by the government. This method of implementing rent changes is usually used in place of the Tenant Renewal function.

[Current Index / Base Index] X Percentage passed through to tenant X Tenant rent = Increase

The calculations then check the increase amount against any tenant minimum or maximum CPI increases and determine the tenant's final CPI Increase. The procedure then generates a statement to let the tenant know their new rent amount for the next billing period.

The CPI method of increasing recurring charges is most often used to increase Base Rent, but can be used to increase other income codes as well.

Usually, the CPI values for a particular time period are not available until after the anniversary period for the tenant, so the CPI escalations are calculated retroactively. In this case, the client has the opportunity to bill back for the charges that would have been collected during the time period that the tenant was billed at the old rate.

CPI Group Codes

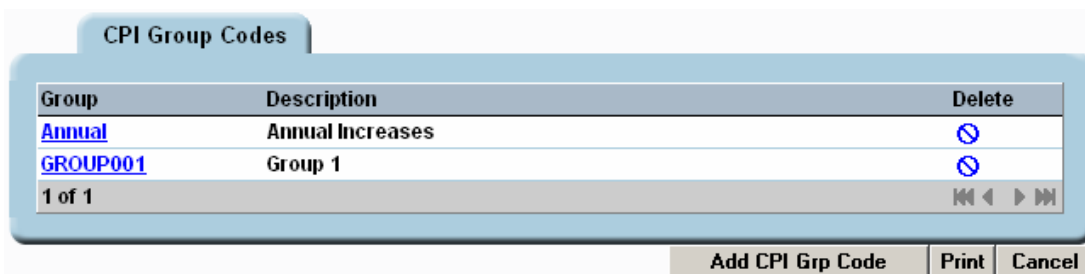
For commercial properties, CPI group codes enable you to specify which escalations should print together. For example, you may want to set up a group code for each calendar month and then assign that code to tenants when entering their CPI billing information. Or, you might want to group tenants by billing frequency.



CPI Group Codes Grid


This grid lists all of the current CPI group codes for the property and enables you to add, edit, and delete group codes. You can also print a list of the property's CPI group codes in PDF format.

Make the following selections from the eSite menu to display this grid:

Setup—Rebillings—CPI—CPI Group Codes



Group	Description	Delete
Annual	Annual Increases	
GROUP001	Group 1	

1 of 1 

[Add CPI Grp Code](#) [Print](#) [Cancel](#)

Fields

Group

The name of the CPI group code. Click to edit the CPI Group Code details on the CPI Group Code tab.

Description

A description of the CPI group code.

Delete

Click to delete the CPI group code.

Add CPI Grp Code

Click to add a new CPI group code on the CPI Group Code tab.

Print

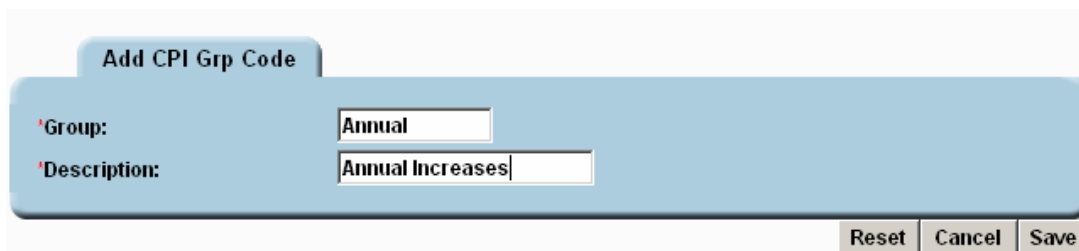
Click to print a list of all CPI group codes for the property in PDF format.

Cancel

Click to return to the Dashboard without saving changes.

CPI Group Code Tab

This tab appears when you the Add a Group Code button or select a Group Code hyperlink on the CPI Group Codes grid. Use this tab to add or edit CPI group codes.



Add CPI Grp Code

*Group: Annual

*Description: Annual Increases

Reset Cancel Save

Fields



Note

An asterisk (*) indicates a required field.

Group *

Type an identification code for the CPI group (for example, WRGN for West Region Properties).

Description *

Type a description of the CPI group (for example, West Region Properties).


To Add a CPI Group Code

1. From the eSite menu, select Setup—Rebillings—CPI—CPI Group Codes.
2. Click Add CPI Grp Code.
3. On the CPI Group Code tab, type the **Group** name and a **Description**.
4. Click **Save**.

To Edit a CPI Group Code

1. From the eSite menu, select Setup—Rebillings—CPI—CPI Group Codes.
2. Click the hyperlink for the CPI group code you want to edit.
3. On the CPI Group Code tab, edit the **Description**.
4. Click **Save**.

To Delete a CPI Group Code

1. From the eSite menu, select Setup—Rebillings—CPI—CPI Group Codes.
2. For the CPI Group Code you want to delete, click the **Delete** icon .
3. Click **OK** to confirm.

To Print a List of all CPI Group Codes for the Property

1. From the eSite menu, select Setup—Rebillings—CPI—CPI Group Codes.
2. Click **Print**. A PDF version of the listing opens.

CPI Tables

For commercial properties, you can create tables of index values to be used in CPI calculations when increasing tenant rents. Using CPI tables give the flexibility to calculate rent increases based on different values and stated amounts.



Note

The system requires at least one CPI table value be defined for the tenant's base CPI period and another for their current CPI period before any CPI calculation can be run.

Multiple tables are supported. So, you can create separate tables for categories such as nation, state, city, or other categories specified in the tenant's lease agreement.

Each value in a CPI Table consists of a start date, an amount, and a description. At a minimum, the CPI Table value for the tenant's Base CPI period and one for the Current CPI period must be present for any CPI escalation to work properly.

CPI Tables Grid

This grid lists all of the current CPI tables of index values for the property. It also enables you to add, edit, and delete CPI tables, and print a list of the property's CPI tables in PDF format. Make the following selections from the eSite menu to display this grid:

Setup—Rebillings—CPI—CPI Tables

Table	Description	Delete
TABLE1	CPI Table 1	

1 of 1

[Add CPI Table](#) [Print](#) [Cancel](#)

Fields

Table

The table name. Click to edit the CPI Table details on the CPI Tables tab.

Description

A description of the CPI table.

Delete

Click to delete the CPI Table.

Add CPI Table

Click to add a new CPI table on the CPI Tables grid.

Print

Click to open print a listing of all CPI tables for the property in PDF format.

Cancel

Click to return to the Dashboard.

CPI Tables Tab

This tab appears when you click **Add CPI Table** or select a Table hyperlink from the CPI Tables grid. Use this tab to add or edit the CPI table of index values.

Start Date	Amount	Description	Delete
2/1/1997	161.9	Feb 1997	
2/1/1998	164.5	Feb 1998	
2/1/2008	211.08	Feb 2008	

Fields

Table *

The identification code for the CPI table of index values. The code can consist of up to 10 alphanumeric characters (for example, "USA" for index values at the top government level).

Description *

A description of the CPI table of index values (for example, "USA CPI index values starting year xxxx").

Start Date

The CPI index value start date (mm/dd/yyyy).

Amount

The CPI index value (0000.00).

Description (line)

A description of the CPI index value (0000.00).

Delete

Click the Delete icon to clear the data previously entered on the line.


To Add a CPI Table

1. From the eSite menu, select **Setup—Rebillings—CPI—CPI Tables**.
2. Click **Add CPI Table**.
3. In the **Table** field, type the identification code for the table.
4. In the **Description** field, type a description of the CPI table.
5. For each value, type the **Start Date** (or click the Calendar button to select a date), **Amount**, and **Description**.
6. Click **Save**.

To Edit a CPI Table

1. From the eSite menu, select **Setup—Rebillings—CPI—CPI Tables**.
2. Click the Table hyperlink for the CPI table you want to edit.
3. On the CPI Table tab, make your desired changes.
4. Click **Save**.

To Delete a CPI Table

1. From the eSite menu, select **Setup—Rebillings—CPI—CPI Tables**.
2. For the CPI table you want to delete, click the **Delete** button .
3. Click **OK** to confirm.

To Display and Print a CPI Table Listing

1. From the eSite menu, select **Setup—Rebillings—CPI—CPI Tables**.
2. Click **Print**. A PDF version of the listing opens.

CPI Increase Detail

This format is used for leases that allow for a periodic rent adjustment based on changes in the published CPI value. Unlike the rebilling formats, this function adjusts a tenant's monthly charge in order to recapture expense increases. This type of escalation generates billings only from the difference in the monthly charge if time has lapsed since the rent change was due.



Note

The Consumer Price Index is generally published 30 days after the reporting month.

CPI Increases Setup Tab

Use this tab to add or edit scheduled CPI increases. Make the following selections from the eSite menu to display this page:

Leasing—Lease Changes—(select tenant)—CPI Increases

Setup	Details
Unit-Suite: B1 - PD Unit-Suite Status: Normal Tenant Status: Leased Tenant Name: Bowe's Address: 4901 West Chester Pike	
Unit-Suite Type: RET Unit Sub Type: Market Rent: 21750.59	
Lease Profile	
*CPI Group Code	Annual Increases
*CPI Description	Rent Increase
*CPI Base Period	01/2008
*Starting Date	3/1/2008
*Base Income Code	Base Rent
*Retroactive CPI Code	CPI Increases
Base Annual Amount	48000
Update Base Values	Annually
*CPI Table Code	CPI Table 1
Seq #	1
% Passed Through	100
*Frequency	Annual
*Code to Increase	CPI Increases
Base Previous Billings on	Current Billed
<input type="button" value="Reset"/> <input type="button" value="Cancel"/> <input type="button" value="Next"/>	

Fields

CPI Group Code

The CPI group code. This code determines which escalations are to be printed together.

CPI Table Code

The CPI table code to provide CPI values.

CPI Description

A descriptive name or brief description for the increase.

Seq

A sequential number. Multiple sequence records are needed if you are increasing more than one recurring charge for a tenant using CPI increases.

CPI Base Period

The base period (MM/YYYY) for the CPI base valued stated in the tenant's lease.

% Passed Through

The percentage used to pass through to the tenant.

Starting Date

The date listed on the lease agreement for the tenant from which CPI increases will start calculating. This date is usually the same as the Occupy Date or the Renewal Date. For a new tenant, this date is used in conjunction with the Frequency to determine when the tenant is eligible for their first increase.

Example: *Starting Date = 01/01/2009, Frequency = Annual*
 Anniversary Date = Starting Date + Frequency = 01/01/2010

The Anniversary date must fall within the CPI Increase period in order for the tenant to be eligible for the increase.

Frequency

The frequency for billing the increase. Options include: Annual, Semi-Annual, Monthly, Quarterly, 2-years, 3-years, 4-years, and 5-years.

Base Income Code

The increase base income code that the escalations are based on (usually rent), using the CPI change.

Code to Increase

The income code to use for the additional amount based on the CPI calculation. This is the income code that is adjusted in the recurring charges when CPI Escalations are processed.

**Note**

This can be the same income code as the Base Income Code or a different income code. If you want to Update Base Values, the income code must be the same.

Retroactive CPI Code

The retroactive CPI code. This is the income code that will be charged the difference between what the tenant pays in the new period and the new recurring charge amount.

Base Annual Amount

The annual amount of the rent code's recurring charge from the Recurring Charges screen. The amount is automatically pulled in from the Base Income Code's recurring charge and converted to an annual amount, i.e., if the Base Income Code recurring charge has a frequency of Monthly, then it is multiplied by twelve.

Base Previous Billings On

The item to base previous billings on: Current Billed or Previous Charges.

Update Base Values

The frequency for updating the base values. After the CPI Calculations are run, this option changes the Base Period field to the CPI Period based on the frequency selected, and updates the Base Annual Amount to the new annual amount. Options include Never, Annual, Semi-Annual, Monthly, Quarterly, 2-years, 3-years, 4-years, and 5-years.

**Note**

If you want the Base Annual Amount to update, the Code to Increase must be the same as the Base Income Code.

CPI Increase Detail Tab

Use this tab to add or edit details of the scheduled CPI increases. This tab appears when you click the Details tab or **Next** from the CPI Increases Setup tab.

Unit-Suite: B1 - PD
Unit-Suite Status: Normal
Tenant Status: Leased
Tenant Name: Bowe's
Address: 4901 West Chester Pike

Unit-Suite Type: RET
Unit Sub Type:
Market Rent: 21750.59

[Lease Profile](#)

Min/Max Amounts are based on:

Minimum: Annual (dropdown), CPI Type: Percentage of base amount (dropdown), CPI Amount: 0 (dropdown)

Maximum: Annual (dropdown), CPI Type: No Maximum (dropdown)

Days After to mail: 5 (input), Annual Amount as of Last Calc: 0 (dropdown)

Days After Due: 15 (input), Date of Last Calc: (calendar icon)

Address:

Primary: Mailing1: Billing1: Statement1: Guarantor1:
Mailing2: Billing2: Statement2: Guarantor2: Other:

Previous Reset Cancel Save

Fields

Minimum

The minimum increase of the CPI Escalation based on the CPI Type.

CPI Type

The minimum increase is based on the following options: No Minimum, Percentage of base amount, Percent of current billing amount, and Fixed Dollar amount.

CPI Amount

The percentage or dollar amount of the maximum increase. If there is no maximum, this field is hidden.

Maximum

The maximum increase of the CPI Escalation based on the CPI Type.

CPI Type

The maximum increase is based on the following options: No Maximum, Percentage of base amount, Percent of current billing amount, and Fixed Dollar amount.

CPI Amount

The percentage or dollar amount of the maximum increase. If there is no maximum, this field is hidden.

Days after to Mail

The number of days after the reporting period that the CPI statement should be mailed.

Annual Amount as of Last Calc

The previous annual rent for this tenant. This is automatically updated by the system when the CPI Calculations are run.

Days after Due

The number of days until the CPI Escalation amount is due.

Date of Last Calc

The date the last CPI Calculations were run for this tenant. This is automatically updated by the system when the CPI Calculations are run. After the first time the CPI Calculations are run, if the Date of Last Calc was blank the first time run, this becomes the new date to calculate the Anniversary Date.



Note

If you are setting up existing tenants for which CPI Calculations have already been run, you must manually enter in the Date of Last Calc so the anniversary date will be set correctly.

Address

Select one of the following address options.

- Primary – The address used as the principal address for the current tenant.
- Mailing – The address used for mailing labels.
- Billing – The address used for invoices, late notices, and special billings.
- Statement – The address used in statements.
- Guarantor – The individual/company that guarantees that the lease will be paid. May also be a lease co-signer.
- Other – Use to enter additional addresses that do not fall into any of the above categories.


To Add a CPI Increase

1. From the eSite menu, select **Leasing—Lease Changes**. Then, select a tenant and click **CPI Increases**.
2. Click **Add CPI**.
3. Complete the tab using the field list Setup Tab.
4. Click **Save**.

To Edit a CPI Increase

1. From the eSite menu, select **Leasing—Lease Changes**. Then, select a tenant and click **CPI Increases**.
2. Click the CPI Description hyperlink for the CPI Increase you want to edit.
3. On the CPI Increase Setup and Details tabs, make your desired changes.
4. Click **Save**.

To Delete a CPI Increase

1. From the eSite menu, select **Leasing—Lease Changes**. Then, select a tenant and click **CPI Increases**.
2. For the CPI Increase you want to delete, click the **Delete** button .
3. Click **OK** to confirm.

CPI Calculations

This option is used to generate annual rent adjustments based on changes in an index value, such as the CPI. The CPI function automatically determines the annual percentage change in the index value and adjust the tenant's scheduled monthly rent.

The CPI value for a particular time period is not usually available until after the anniversary period for the tenant, so the CPI Escalations are calculated retroactively. You can bill the charges that would have been collected during the time period that the tenant was billed at the old rate. This retroactive amount can be billed to a different income code other than the one being escalated.

CPI Calculations Tab

Make the following selections from the eSite menu to display this page:

Rebilling—CPI—CPI Calculations

Use this tab to calculate and adjust tenant charges based on value changes within Consumer Price Indexes. The CPI program produces monthly data on changes in the prices paid by urban consumers for a representative basket of goods and services.

The screenshot shows a web form titled "CPI Calculations" with a light blue background. At the top left, it says "This process will run for all selected properties." followed by a "Select Properties" button. Below this, there are several input fields: "CPI Group Code" with a dropdown menu set to "Annual Increases", "Preliminary" with a checked checkbox, and "Current CPI Index(MM/YYYY)" with an empty text box. The "CPI Period For Increases Due:" section includes "From" and "Thru" date pickers, both set to 01/01/2008 and 12/31/2008 respectively. There is a "Retroactive Billing" checkbox which is unchecked. A "Statement:" section contains a "Print CPI Statements" checkbox (checked), a "Document" dropdown menu, and a "Message:" text area. At the bottom right, there are three buttons: "Reset", "Cancel", and "Process".

Fields

Select Properties

Click to select properties from the Select Properties tab. The process runs for all selected properties.

CPI Group Code

The group code tells the system which tenant CPI escalations to use for the calculations. CPI group codes are established on the CPI Group Codes Tab.

Preliminary

Select this check box (recommended) to run a preliminary update to review and audit adjusted amounts, tenant charges, and retroactive billings generated as a result of CPI changes before running the final update. Or, clear the check box to run a final update to bill those amounts to tenants and print associated CPI statements.

Report Name

This option is available when the Preliminary option is not selected. The Report Name is a system-generated report name that is created when the final CPI Calculations are run and is saved in the **Amsiweb\Siteweb\Output** folder. To avoid overwriting an existing file the next time the process is run, the system gives the report a unique file name that includes the User ID and date.

Description

This option is available when the Preliminary option is not selected. Type a description for the file that is created when the CPI Calculations are run.

Current CPI Index (mm/yyyy)

The period of the current CPI index values to use as a basis for calculating CPI adjustments. For example, if the current CPI index is January 2010, then system pulls the corresponding 01/2010 index value from the table defined on the Tenant Profile tab.

CPI Period for Increase Due From/Thru

The date range used to calculate CPI escalations. Tenants whose anniversary date falls between the From and Thru dates are included in the calculations. When processing CPI calculations, the software uses an anniversary date. This date is calculated as follows:

The software checks the tenant for a Date of Last Calc on the CPI Increases Details tab. If no Date of Last Calc exists, the software uses this Starting Date on the CPI Increases Setup tab.

This date is used in conjunction with the Frequency on the on the CPI Increases Setup tab to determine the anniversary date. For example, if a tenant has a Date of Last Calc or Starting Date of 01/01/2010 and a frequency of Annual, the anniversary date will be 01/01/2011.

When generating CPI escalation statements, the software compares the anniversary date to the date range entered here. If the anniversary date falls within this range, the tenant payment amount will be adjusted and the Date of Last Calc field updated. This allows the CPI escalation function to adjust only those tenants requiring a CPI change.

Retroactive Billing

Because the CPI values for a particular time period are normally not available until after the tenant's anniversary period, increases may be calculated retroactively. This retroactive amount may be billed to a tenant using the income code defined in the Tenant Profile.

Select this check box (default) to create tenant billings for the months which have passed since the increase was scheduled to begin. This is to accommodate the time lag in receiving the latest published index rate. Or, clear the check box to indicate retroactive billings or calculations should not be created or run.

Bill Charges Through

The date (mm/dd/yyyy) identifying the end of the tenant's retroactive billing period. This date is used to determine the tenant billing for the number of months which have passed since the increase was scheduled. Typically, this is the system current period. The Calendar Button enables you to select a date.

Retroactive Billing Due

The tenant due date (mm/dd/yyyy) for retroactive billing charges. The Calendar Button enables you to select a date.

Print CPI Statements

Select this check box (default) to print CPI statements after the CPI Calculation Report. Or, clear the check box to indicate CPI statements should not be printed.

Document

Select the CPI statement letter into which the system will merge the tenant CPI billing details.

Message

If desired, add any additional message to be printed on the CPI Escalations Statements.

Cancel

Click to exit the tab without saving changes.

Process

Click to process the request.

To Calculate CPI and Print Statements

1. From the eSite menu, select Rebilling—CPI—CPI Calculations.
2. Click **Select Properties** to select properties from the Select Properties tab. The process runs for all selected properties.
3. From the **CPI Group Code** drop-down list, select the group code.
4. If you want to run a preliminary update to review before running the final update, select the **Preliminary** check box. Otherwise, clear the check box.
5. In the **Current CPI Index (mm/yyyy)** field, type the period of the current CPI index values to use as a basis for calculating CPI adjustments.
6. In the CPI Period for Increase Due **From/Thru** fields, type the date range to be used to calculate CPI escalations. Or, use the Calendar buttons to select the From and Thru dates.
7. If you want to create tenant billings for the months which have passed since the increase was scheduled to begin, select the **Retroactive Billing** check box. Otherwise, clear the check box.
8. In the **Bill Charges Through** field, type the date (mm/dd/yyyy) identifying the end of the tenant's retroactive billing period. Or, use the Calendar Button to select a date.
9. In the **Retroactive Billing Due** field, type the tenant due date (mm/dd/yyyy) for retroactive billing charges. Or, use the Calendar Button to select a date.
10. Select the **Print CPI Statements** check box if you want to print CPI statements after the CPI Calculation Report. Otherwise, clear this check box.
11. From the **Document** drop-down list, select the CPI statement letter into which the system will merge the tenant CPI billing details.
12. In the **Message** field, add any additional message to be printed on the CPI Escalations Statements.
13. Click **Process**.

Example

The following shows a sample setup and calculation for a tenant.

Setup:

Tenant Setup – 01-103 Dr Houseman MD

CPI Group Code

Edit CPI Grp Code

*Group: Annual
*Description: Annual Increases

Reset Cancel Save

CPI Table of Index Values

Edit CPI Table

*Table: USA
*Description: USA CPI Amounts

Start Date	Amount	Description	Delete
1/1/1999	150	Jan - Dec 1999	<input type="checkbox"/>
1/1/2000	155	Jan - Dec 2000	<input type="checkbox"/>
1/1/2001	157	Jan - Dec 2001	<input type="checkbox"/>
1/1/2002	160	Jan - Dec 2002	<input type="checkbox"/>
1/1/2003	165	Jan - Dec 2003	<input type="checkbox"/>

1 of 1

Reset Cancel Save

CPI Setup

Setup Details

Suite: 01 - 103
Suite Status: Normal
Tenant Status: Current
Tenant Name: Dr. Houseman MD
Address: 255 North St. Suite 103

Suite Type: 1
Unit Sub Type:
Market Rent: 7176.74

[Lease Profile](#)

*CPI Group Code: Annual Increases
*CPI Table Code: USA CPI Amounts
*CPI Description: Rent Increase
Seq #: 1
*CPI Base Period: 01/2000
% Passed Through: 100
*Starting Date: 10/1/2001
*Frequency: Annual
*Base Income Code: Rent
*Code to Increase: CPI Rent Increase
*Retroactive CPI Code: CPI Rent Increase
Base Previous Billings on: Current Billed
Base Annual Amount: 86120.88
Update Base Values: Annually

Reset Cancel Next

CPI Details

Setup Details

Suite: 01 - 103 Suite Type: 1
Suite Status: Normal Unit Sub Type:
Tenant Status: Current Market Rent: 7176.74
Tenant Name: Dr. Houseman MD
Address: 255 North St. Suite 103 [Lease Profile](#)

Min/Max Amounts are based on:
Minimum Annual CPI Type Percentage of base amount CPI Amount 0
Maximum Annual CPI Type No Maximum

Days After to mail 5 Annual Amount as of Last Calc
Days After Due 15 Date of Last Calc

Address:
Primary: Mailing1: Billing1: Statement1: Guarantor1:
Mailing2: Billing2: Statement2: Guarantor2: Other:

Previous Reset Cancel Save

CPI Calculations

CPI Calculations

CPI Group Code Annual Increases Preliminary
Current CPI Index(MM/YYYY) 01/2002

CPI Period For Increases Due:
From 01/01/2002 Thru 12/31/2002

Retroactive Billing

Statement:
Document CPIStateNew.doc
Print CPI Statements
Message:

Reset Cancel Process

Calculations:

01-103 Dr Houseman MD

Annual Rent: \$86,120.88

Monthly Rent: \$ 7,176.74

Base Year: 01/2008

Start Date: 01/01/2009

Anniversary Date: 01/01/2010

CPI Period: 01/2010

2010 CPI value = 160

2008 CPI value = 155

[Current Index / Base Index] X Percentage passed through to tenant X Tenant rent = Increase

$160 / 155 = 1.0323$ New/Base

$86120.88 * 1.0323 = 88,902.58$

$88902.58 - 86120.88 = 2,781.70$ Initial CPI Adj / Final CPI Adj

$86120.88 + 2781.70 = 88,902.58$ New Rent Amount

$88902.58 / 12 = 7408.55$ New Tenant (Rent) Charges

ECM
 01CMP
 Select: 02/17/04
 25 Suites, 55,722 Sq. Ft.

CPI Calculation
Geac Property Management Inc.
Central Market Plaza
February 17, 2004

Page: 1 of 1
 07/2003
 05/12/04
 9:08

Suite	Name	Table	New/ Base	Base Code	Base Amt	Initial CPI Adj	Pass Thru %	Min/ Max	Final CPI Adj	New Amt	New Taxes	New Teannt Charges	Retro Code	Retro Charges
01-103	Dr. Houseman MD	USA	1.03	Rent	86,120.88	2,781.70	100.00	0.00 0.00	2,781.70	88,902.58	0.00	231.81	CPI	0.00

Frequently Asked Questions/Troubleshooting

Can I add more than one Consumer Price Index (CPI) table in eSite?

Yes. Multiple tables are supported. You can create separate tables for categories such as nation, state, city, or other categories specified in the tenant's lease agreement.

Do I have to enter every month in the year for the Start Date in the CPI Table, or just the months that I have linked to my tenants I am running the CPI Calculations for?

You can enter all months for the year, but you only have to enter the dates that will be used in the CPI Calculations.

Do I have to manually update the CPI Base Period after the CPI Calculations have been run?

No. If you select the **Update Base Values** option in the Tenant CPI Setup to any frequency besides the *Never* option, the system automatically increases the CPI Base Period to the CPI Period for which the CPI Calculations were just run. The system also updates the Base Annual Amount to the Base Income Codes new annual recurring charges amount if the Code to Increase is set to the same Base Income Code.

I don't want my CPI Base Period to update for a tenant. Does it always update?

No. If you do not want it to update, set the **Update Base Values** option in the Tenant CPI Setup to *Never*. The CPI Base Period and the Annual Base Value will not update after the CPI Calculations are processed.

Can the resident's Code to Increase income code be the same as the Base Income Code?

Yes. If you select the same Code to Increase as the Base Income Code, the system will expire the old Base Income Code recurring charges and add a new Base Income Code recurring charge with the new CPI increase. If you use a different Code to Increase than the Base Income Code, then the system will leave the Base Income Code recurring charges as is, and add a new recurring charge with the Code to Increase income code and the CPI increase amount.

How can I determine a tenant's Anniversary Date?

The Anniversary date is calculated as follows:

The software checks the tenant for a **Date of Last Calc** on the CPI Increases Details tab. If no Date of Last Calc exists, the software uses this Starting Date on the CPI Increases Setup tab. This date is used in conjunction with the Frequency on the CPI Increases Setup tab to determine the anniversary date. For example, if a tenant has a Date of Last Calc or Starting Date of 01/01/2010 and a frequency of Annual, the anniversary date will be 01/01/2011.

What if my tenant is not printing on the CPI Calculations report as expected?

Check the From and Thru date range used to calculate CPI escalations. Tenants whose anniversary date falls between the From and Thru dates are included in the calculations. When processing CPI calculations, the software uses an anniversary date. When generating CPI escalation statements, the software compares the anniversary date to the date range entered here. If the anniversary date falls within this range, the tenant payment amount is adjusted and the Date of Last Calc field is updated. This enables the CPI escalation function to adjust only the tenants that require a CPI change.

We are new to eSite, but have been running CPI Calculations for our tenants. How do I set the correct Anniversary Date so they are processed correctly?

If you are setting up existing tenants for which CPI Calculations have already been run, you must manually enter the Date of Last Calc so the anniversary date will be set correctly.

I am running CPI Calculations three months after the tenant's increase should have gone into affect. Can I recoup the past three month charges difference?

Because the CPI values for a particular time period are normally not available until after the tenant's anniversary period, increases may be calculated retroactively. This retroactive amount may be billed to a tenant using the income code defined in the Tenant Profile. Select the Retroactive check box (default) to create tenant billings for the months which have passed since the increase was scheduled to begin. This is to accommodate the time lag in receiving the latest published index rate.

Can I print a CPI Statement to give to my tenants?

Select the Print CPI Statement check box (default) to print CPI statements after the CPI Calculation Report is printed. You can create a customized CPI statement to print during the CPI Calculation process. For more information about Letters, refer to the eSite Help.