



City of Palo Alto Rental Registry Program

Rental Property Owner/Property Manager User Guide

Version 1.3 July 2025



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Introduction

This step-by-step user guide helps rental property owners, property managers, and authorized representatives with completing the City of Palo Alto's Rental Registry Program registration and event-based reporting processes.

This user guide is provided by the City's software consultant, 3Di. If you have any registration and event-based reporting technical assistance questions, access the 3Di HelpDesk. You can receive chat support on weekdays from 8am-12pm at the following website: https://paloalto.3diengage.com/support/. You can receive phone support on weekdays from 8am-12pm by calling 650-459-0138. Otherwise, you can email questions to pa-rentalregistry-techsupport@engagehelpdesk.com.

Please visit <u>www.cityofpaloalto.org/rentalregistry</u> to learn more about the Rental Registry Program and to access the online registration portal.

Getting Started

You should have received a registration letter from the City of Palo Alto's Rental Registry Program if you own at least one property that is subject to the City's registration requirement. Please save this letter and the unique PIN highlighted in the top right corner of the letter.

If you have received a letter from the City of Palo Alto's Rental Registry Program requesting you to register your rental property and you are no longer the owner or manager of this property or believe this program does not apply to your property, please contact the City of Palo Alto Rental Registry Program at rentalregistry@paloalto.gov. You may be asked for additional details/information so records can be updated.

For your initial registration or for your annual registration renewal, you will be required to ensure that the information related to your property is accurate. Please add or review property contact information for property owner(s) and property managers and add or update any property and unit information. The information that you submit will be saved in the Rental Registry Program online portal for your later use in future annual registration cycles.

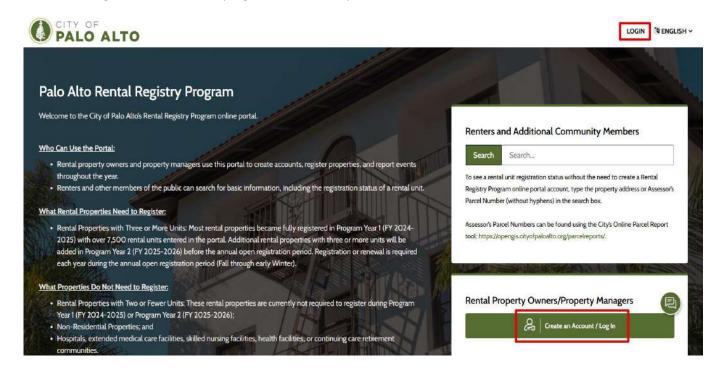
Once an initial or annual registration renewal is completed, please continue to use the portal throughout the year to report events within ten (10) calendar days of occurrence. such as if a unit has a Rent Increase, Notice to Quit, Unlawful Detainer, or Eviction.



Create a Login to the Rental Registry Program Portal

To use the Rental Registry Program online portal, you will first need to create an account and login:

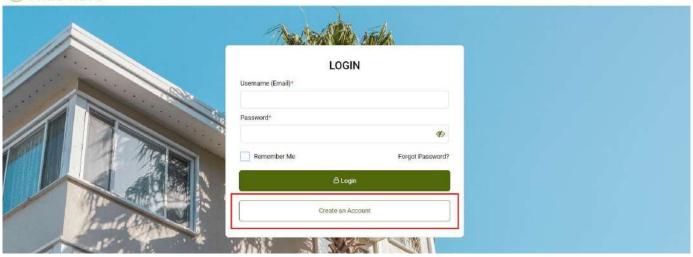
- Open your web browser and go to <u>www.paloalto.gov/rentalregistry</u> and click on the "Access Online Registration Portal" button. This will take you to the Palo Alto Rental Registry Program online portal landing page. Alternatively, you can use the direct weblink to the online portal: https://paloalto.3diengage.com/.
- 2. When you are on the portal landing page, either click on the "Create an Account / Log In" button OR the "Login" button at the top right corner of the portal.





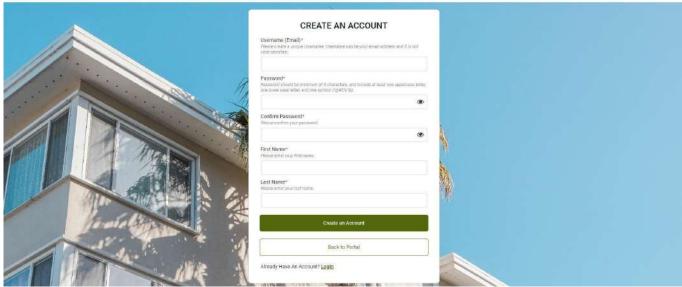
3. Select "Create an Account" to create a new account.





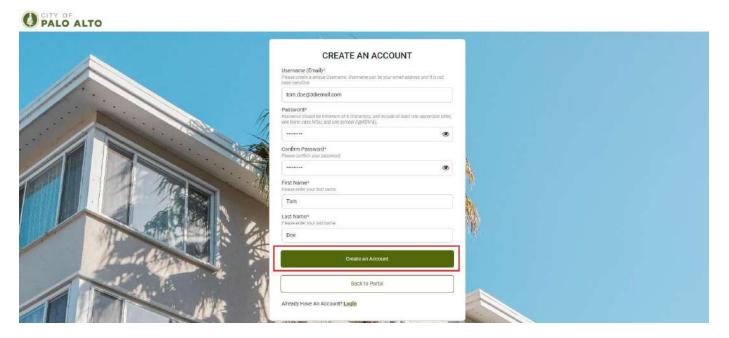
- 4. Enter the following information to create your account:
 - **Username (Email Address)** Ensure you have access to your email address inbox, as you will need to verify your email address to complete account creation.
 - Password Your password should be minimum of 6 characters, and include at least one
 uppercase letter, one lower case letter, and one symbol (!@#\$%^&)
 - First Name
 - Last Name







5. Click on the "Create an Account" button.



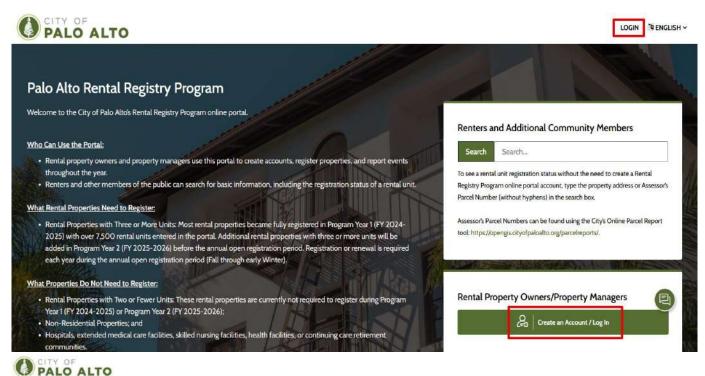
- 6. The portal will send an account verification email with an Activation Link to the Username/Email Address that you provided. The email should arrive within a few minutes, and the **activation link expires in 15 minutes.** If you do not see this email in your inbox, please check your spam folder. Click on the Activation Link in the email to confirm your account and complete the account creation process.
- 7. If you have additional people that will help you with registration and event reporting, please feel free to have them set up their own account using these same steps.

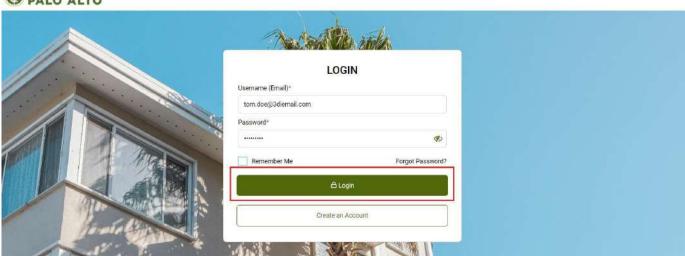


Accessing Your Account & Adding a Property to Your Account

Now that you have created and activated your account, log in to the Rental Registry Program online portal. When you log in, you will see your dashboard. Your dashboard will be empty until you add and claim your property to your account. Follow the steps below for each property that you own or manage that is required to register.

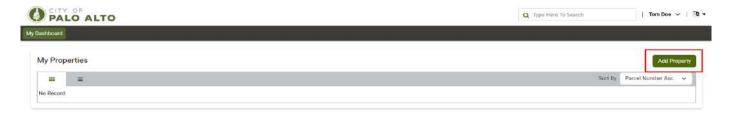
1. Click on either of the "Login" buttons on the portal landing page.





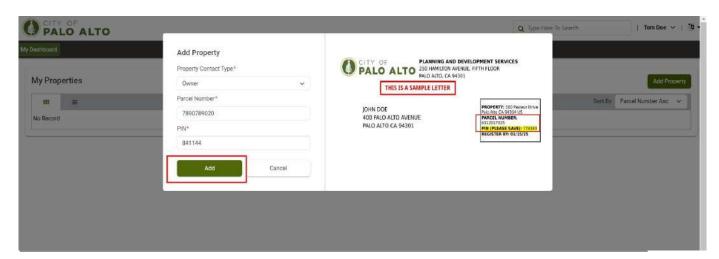


2. Retrieve the Registration Letter sent to you by the City of Palo Alto Rental Registry Program and click on the "Add Property" button on the top right corner of your dashboard.





- 3. In the "Add Property" pop up, you will need to enter the following:
 - Property Contact Type indicate if you are the Owner, the Property Manager or the Authorized Representative
 - Parcel Number you can find this in the Registration Letter
 - PIN you can find this in the Registration Letter
- 4. Enter the necessary information and click on the "Add" button.





5. Your property will appear on your dashboard as shown below. Repeat these steps for each property that you are required to register.



INITIAL REGISTRATION PROCESS

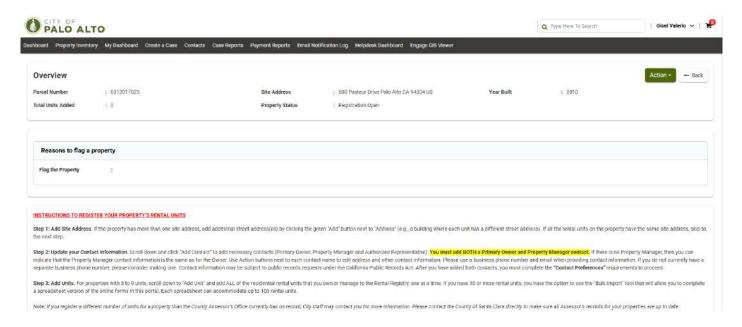
Now that you have added your property to your account, you will need to complete either the initial registration or the annual registration renewal process. To complete initial registration, click on the "View" button.



If you have questions about the Rental Registry Program, contact the City of Palo Alto at rentalregistry@paloalto.gov_or visit www.paloalto.gov/rentalregistry. For specific registration technical support, contact the Rental Registry Program HelpDesk at pa-rentalregistry-techsupport@engagehelpdesk.com or visit https://paloalto.3diengage.com/support/.



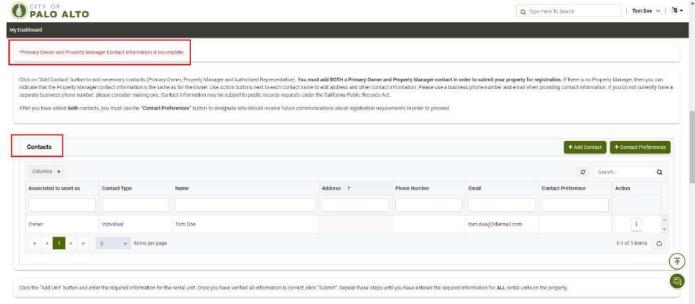
The **Property Overview** page will open. This page has different sections that are necessary to complete as part of the registration process.



Step 1: Add/Update Contact Information

The first step to property registration is to add/update the property contacts. It is required that each property contains at least one Owner contact and at least one Property Manager contact.

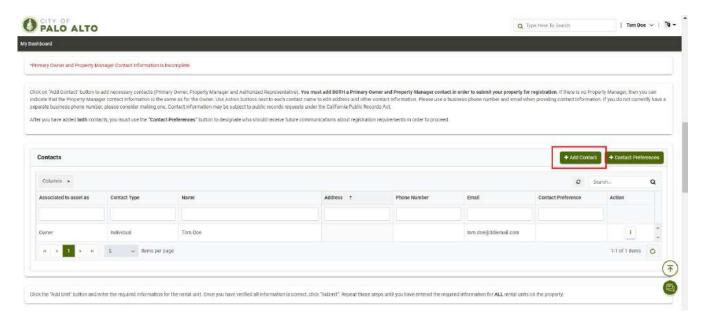
1. Scroll down to the Contacts section. If you see the red text "Primary Owner and Property Manager, Contact Information is Incomplete" as shown in the image below, you will need to add the missing contact type.



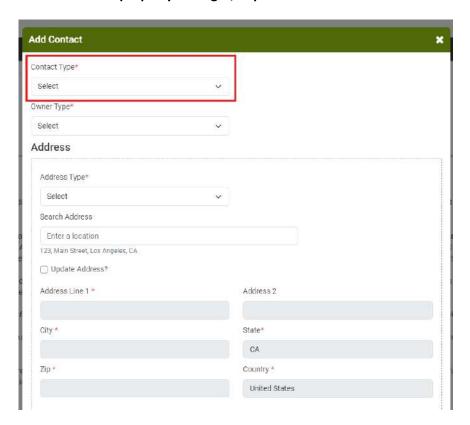
If you have questions about the Kental Registry Program, contact the City of Palo Arto at rental registry (wpaloalto.gov/rentalregistry). For specific registration technical support, contact the Rental Registry Program HelpDesk at <u>pa-rentalregistry-techsupport@engagehelpdesk.com</u> or visit https://paloalto.3diengage.com/support/.



2. Click on the "Add Contact" button to add the missing contact type.



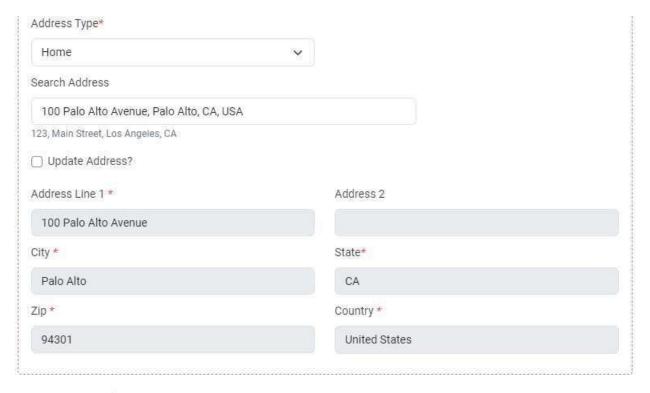
3. The Add Contact pop up will appear. Select the **Contact Type** from the dropdown list. If your property already has an "Owner" contact added, then you will need to add a "Property Manager". **If** there is no property manager, duplicate all of the "Owner" contact information.



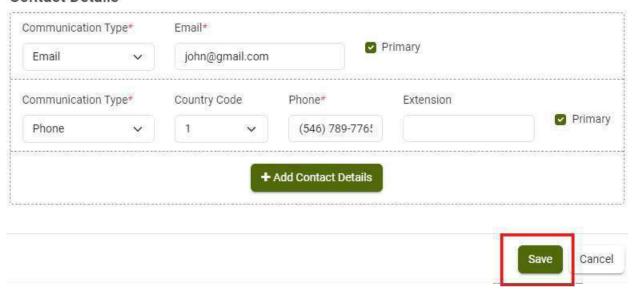
If you have questions about the Rental Registry Program, contact the City of Palo Alto at rentalregistry@paloalto.gov_or visit www.paloalto.gov/rentalregistry. For specific registration technical support, contact the Rental Registry Program HelpDesk at pa-rentalregistry-techsupport@engagehelpdesk.com or visit https://paloalto.3diengage.com/support/.



4. Add the required information in the pop up and then Save the contact. You are required to provide the First Name, Last Name, Mailing Address, Email Address, and Phone Number.

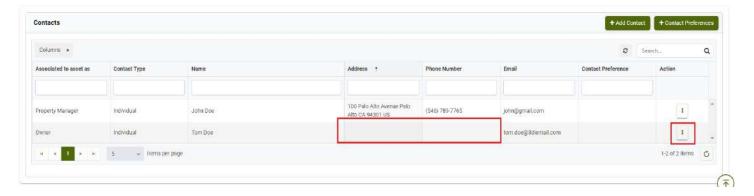


Contact Details

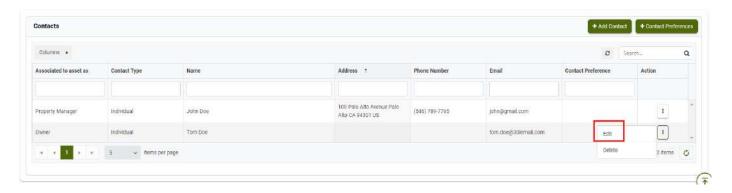




5. The Contacts table will be updated. If the "Owner" contact is missing any information in the grid (Mailing Address, Email, or Phone), click on the **three vertical dots** as shown below to edit the contact details.

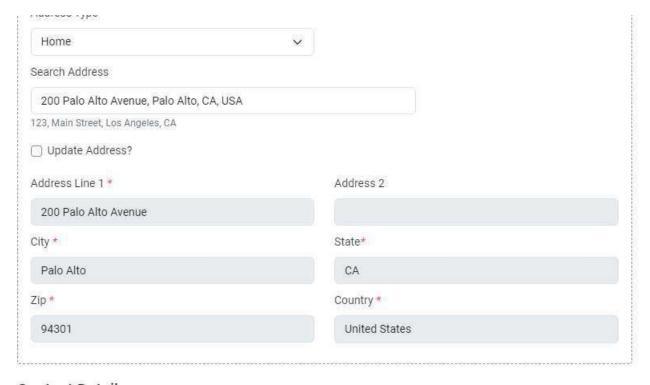


6. Select the "Edit" action.

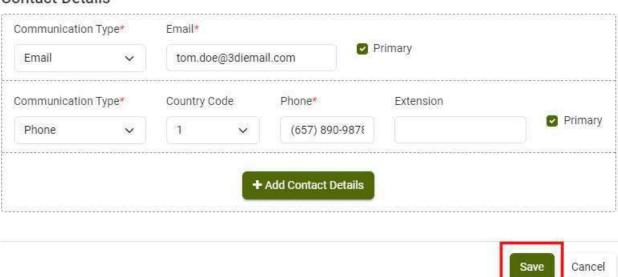




7. The Edit Contact pop up will appear. Many of the required fields may be missing (i.e., Address, Phone, Email etc.). Enter the required information and then Save the contact.

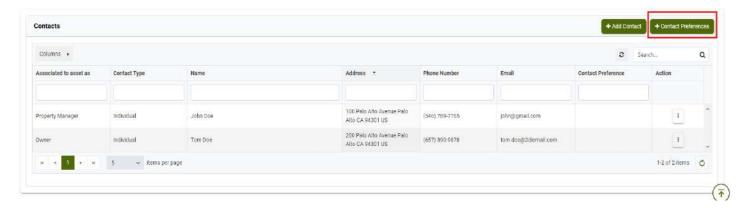


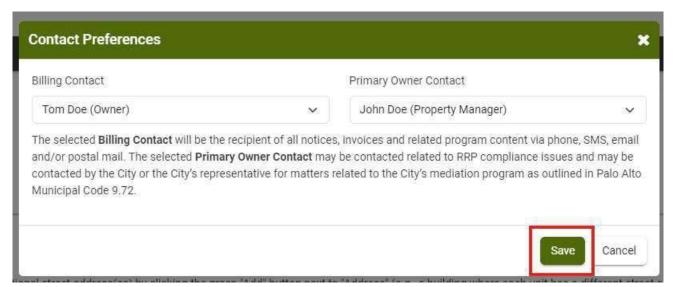
Contact Details



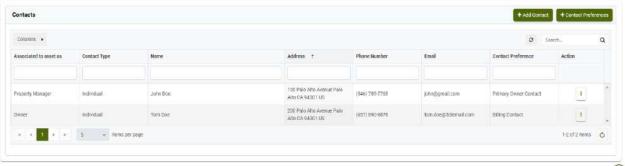


8. The Contacts table will be updated. Next, set your preferences for contacts by clicking on the "Contact Preferences" button. You may already see preset values for this on your property. You can edit/modify these at any time. Select the "Billing Contact". This contact will be the recipient of all notices, invoices and related program content via phone, SMS, email and/or postal mail. Next, select the "Primary Owner Contact". This can also be the same as the Billing Contact. Save your preferences using the "Save" button.





9. The Contacts table will be updated. If there are additional Property Manager(s) or Property Owner(s) associated with the property, you can add them using the "Add Contact" button.

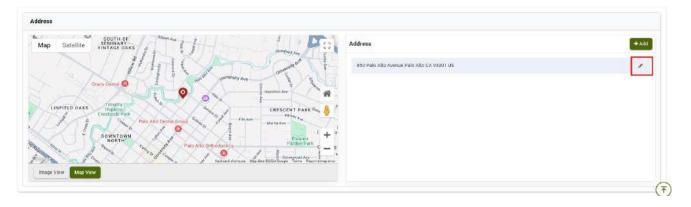




Step 2: Add Property Site Address(es)

Your property will have a primary site address listed. Some properties are large and may contain more than one site address or units might be individually addressed. Please review the Address(es) associated with your property and follow the steps listed below if changes are required.

1. Scroll to the Address area. You will be able to manage the site addresses from this section. The Address listed on the property is the primary site address. Check to see if the site address is correct. If not, click on the Edit icon next to the address to modify it, as shown below.

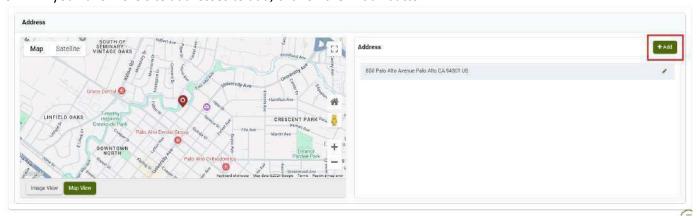


2. The "Edit Site Address" pop up will appear. Modify the necessary information and save your changes.





3. If you have more site addresses to add, click on the "Add" button.

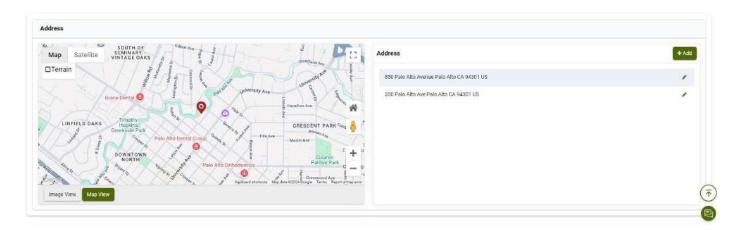


4. The "Add Site Address" pop up will appear. Enter the required information (Address Line 1, City, Zip) and save your changes.





5. The Addresses section will be updated with any modified or new site address(es). Repeat as needed until all the site addresses associated with your property are added.

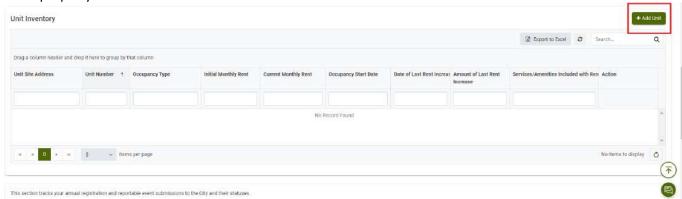


Step 3: Add Unit(s)

You now need to add units to your property and provide details about these units, such as occupancy or vacancy status, rent amount, and services/amenities provided. Adding units is an activity that you will only need to do during initial registration, unless a new unit is built, a unit is demolished, or units are combined. Once the inventory of units is established on your property, you will only need to provide updates to the occupancies and rents of those units moving forward. Follow the steps listed below to add unit(s) to your property.

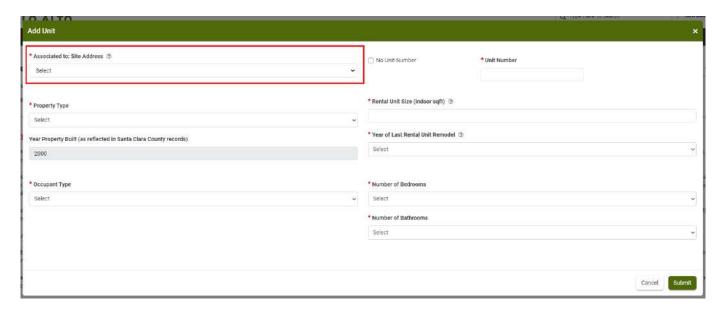
*Note: Not every unit field will be explained in this guide. If you have specific questions, contact the City of Palo Alto Rental Registry Program or the 3Di Registration Technical Assistance Helpdesk.

 Scroll down to the **Unit Inventory** section. Click on the "Add Unit" button to begin adding a unit to your property.

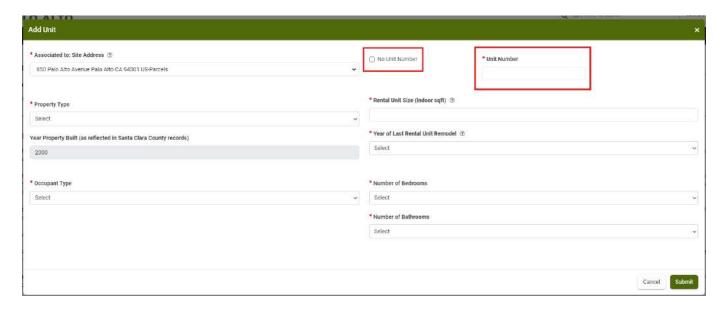




Select the Unit's Site Address from the dropdown as shown below. This dropdown will contain all the
added property site addresses. If you realize an address is missing, you can close this window and add
it to the "Address" section of the **Property Overview** page. The selected address should be part of the
unit's mailing address.

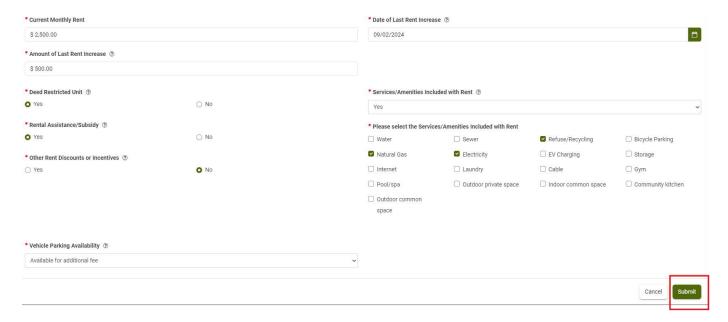


3. Next, we need to know the name of the unit. This, too, should be part of the unit's mailing address. If the unit does not have a specified name, click the "No Unit Number" checkbox. This would indicate that the unit mailing address is the same as the site address.

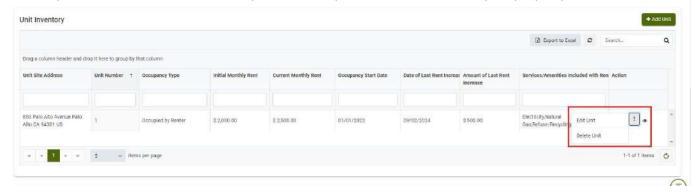




4. Enter the required fields listed in the pop up to continue adding the unit to your property. Note that some field selections may require you to provide more information. The required fields will contain a red asterisk (*) next to them. The form cannot be saved until all the required fields are entered. Once all the required information is entered, click on the "Submit" button.



5. The Unit Inventory table will be updated. Each unit added to the inventory will have its own Action menu displayed. If you made any error, you can use the **three vertical dots**, select the "Edit Unit" option, and correct the details. Repeat these steps to add all the units on your property.

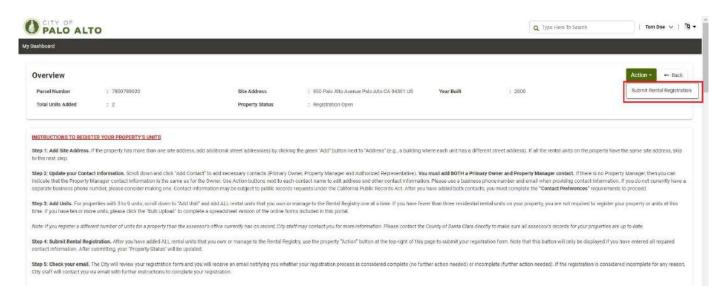




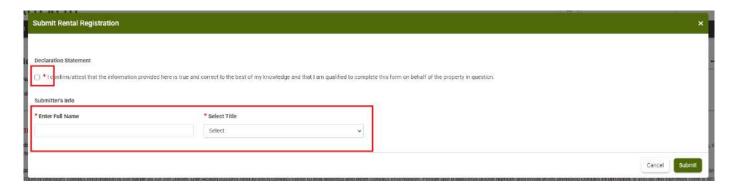
Step 4: Submit Property and Unit Registration Information

Before you submit the registration information for your property and units, please check the following:

- Property Contacts are accurate (Contacts section)
 - There is an Owner Contact AND a Property Manager Contact
- All Units are added (Unit Inventory Section)
 - Unit Mailing Addresses are accurate
 - Unit Details provided are accurate
- 1. Scroll to the top of the **Property Overview** page. Click on the "Action" button. Select the option for "Submit Rental Registration."



2. Read the text in the "Submit Rental Registration" pop up. You will be asked to confirm that the information provided here is true and correct to the best of your knowledge and that you are qualified to complete this form on behalf of the property in question.



3. Click on "Submit" to submit the registration information for your property and units. You will receive an email confirmation and this email will provide you with additional information.

If you have questions about the Rental Registry Program, contact the City of Palo Alto at rentalregistry@paloalto.gov_or visit www.paloalto.gov/rentalregistry. For specific registration technical support, contact the Rental Registry Program HelpDesk at pa-rentalregistry-techsupport@engagehelpdesk.com or visit https://paloalto.3diengage.com/support/.



Step 5: Submit Registration Fee Payment

1. Once the registration information for the property and units has been submitted, you may have to pay registration fees and/or late fees. The property status will be displayed as "Payment Pending," which means that payment of fees is necessary to complete registration.



2. An invoice is available in the Documents section. Scroll down in the **Property Overview** page to find the invoice if you would like to print or download it for future reference.

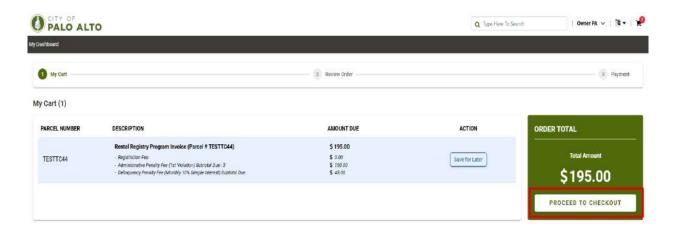


3. Click on the Cart displayed at the top right corner of the screen, and you would be directed to the My Cart screen.





4. Click on "Proceed to Checkout."



5. Review the Order and select either Credit Card or Bank Account and click on "Proceed to Pay."



6. Once payment has been completed, a transaction reference number will be generated, and you will be redirected to the "My Properties" dashboard. You will also receive an email to confirm the successful transaction and registration completion.



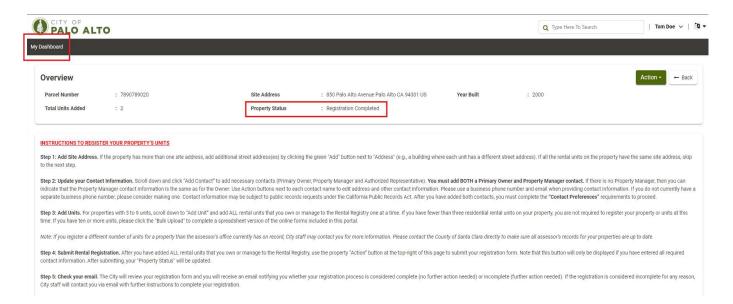
7. If you would like a copy of your receipt, click on "View" and you will be navigated back to the Property Overview screen. Scroll down to the Documents section to find the Payment Receipt. You may click on the **three vertical dots** to download/print the Payment Receipt for future reference.



- 8. If the property and unit information submitted contains the correct unit count, the Property Status will be updated to Registration Completed. This means that the registration has been successfully completed, and no further action is required from your end.
- 9. If you would like a copy of your registration completion certificate, lick on the "Action" button displayed on the top right corner and select "Download Registration Completion Certificate."



10. You can click on "My Dashboard" at the top left of the **Property Overview** page to return to your dashboard to view/register your other properties. Repeat these steps for any other properties.





Step 6: View Updated Property Status

Your property status will be updated once you submit. Review the property statuses and their meanings below:

Property Status	Meaning
Registration Open	The registration period is open, and you need to provide updated information about your property and submit for registration.
Registration Denied	Your registration was submitted, but Staff is unable to process it at this time due to some errors. You will need to review your inputs, make necessary edits, and resubmit.
Unit Discrepancy	Your property has been submitted for registration, and the number of units you have added to the property does not match with the Santa Clara County Assessor's records. Your property is flagged for Staff to review. If you have any questions, please email staff at rentalregistry@paloalto.gov.
Payment Pending	Your property has been submitted but registration has not been completed yet. You need to pay to complete the registration.
Registration Completed	Your property has been submitted for registration and no further action is required. Your property has been successfully submitted for registration. No further action is required at this time.



ANNUAL REGISTRATION RENEWAL PROCESS

If you previously registered a property and units in a prior Program Year, then this property undergoes annual registration renewal. During the annual open registration period (Fall through early Winter), follow the steps below to complete your annual registration renewal process on time to avoid late fees and penalties.

Step 1: Portal Login

Log into your account in the Rental Registry Program online portal. Your "My Dashboard" screen should be visible, and your property(ies) will be displayed in Registration Open status.

Step 2: Update Property and Unit Registration Information

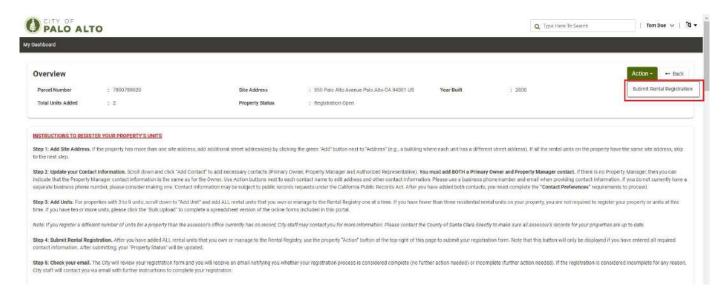
1. Click on the "View" button to access the **Property Overview** page.



- 2. All of the property and unit information from prior registration and event-based reporting will be displayed, such as Contacts and the Unit Inventory.
- 3. Update Contact information, if necessary, by clicking on the **three vertical dots** to the right of the Contacts menu.
- 4. Please open each unit in your Unit Inventory by clicking on the **three vertical dots** to the right of each unit. Update the unit information if necessary. Note that City staff found some typos in some prior registrations in regard to current rent amounts and other information.



1. Scroll to the top of the **Property Overview** page. Click on the "Action" button. Select the option for "Submit Rental Registration."



2. Read the text in the "Submit Rental Registration" pop up. You will be asked to confirm that the information provided here is true and correct to the best of your knowledge and that you are qualified to complete this form on behalf of the property in question.



4. Click on "Submit" to submit the registration information for your property and units. You will receive an email confirmation and this email will provide you with additional information.



Step 3: Submit Registration Fee Payment

1. Once the registration information for the property and units has been submitted, you may have to pay registration fees and/or late fees. The property status will be displayed as "Payment Pending," which means that payment of fees is necessary to complete registration.



2. An invoice is available in the Documents section. Scroll down in the **Property Overview** page to find the invoice if you would like to print or download it for future reference.

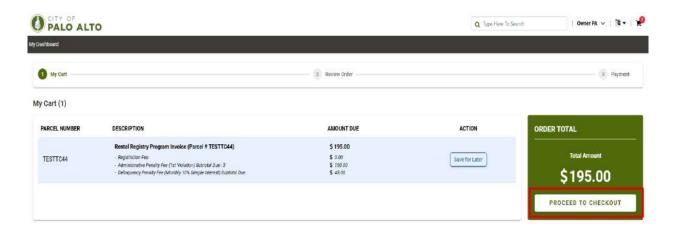


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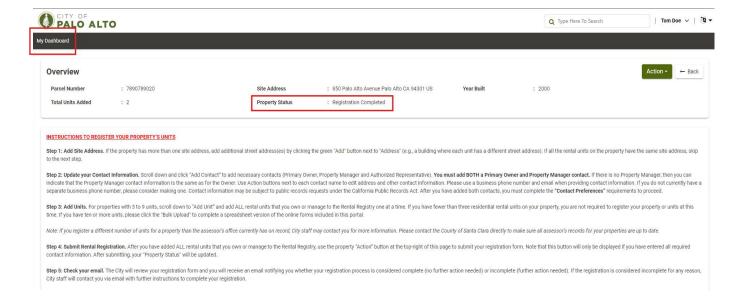
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- 9. If you would like a copy of your registration completion certificate, lick on the "Action" button displayed on the top right corner and select "Download Registration Completion Certificate."



10. You can click on "My Dashboard" at the top left of the **Property Overview** page to return to your dashboard to view/register your other properties. Repeat these steps for any other properties.





REQUIRED REPORTING OF PROPERTY OWNERSHIP CHANGES

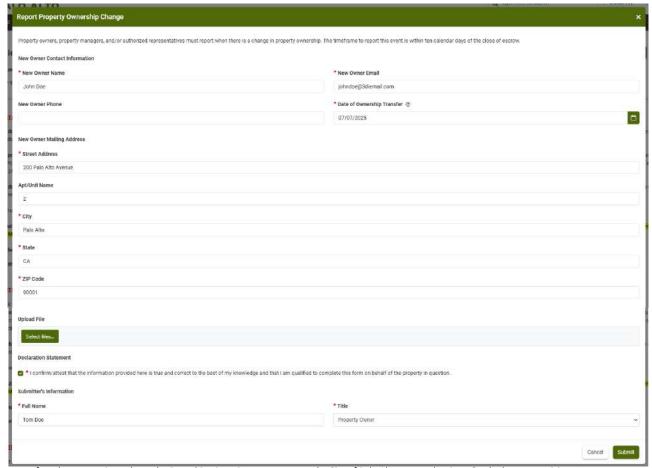
Sale of a property resulting in an Ownership Change must be reported within ten (10) calendar days of the sale through the Rental Registry Program online portal. Follow the steps below to Report a Property Ownership Change.

Report Property Ownership Change

1. Click on Property Action menu located on the top right of the screen and click on Report Property Ownership Change.



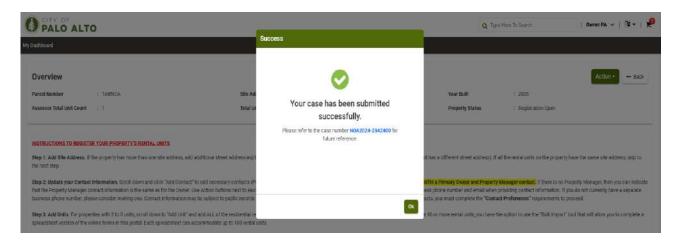
2. Report Property Ownership Change form should pop up. Carefully read the instructions, complete all the form fields (required fields are marked with a red asterisk), and click **Submit**.



If you have questions about the Rental Registry Program, contact the City of Palo Alto at rentalregistry@paloalto.gov_or visit www.paloalto.gov/rentalregistry. For specific registration technical support, contact the Rental Registry Program HelpDesk at pa-rentalregistry-techsupport@engagehelpdesk.com or visit https://paloalto.3diengage.com/support/.



3. A Success message will be displayed on the screen. You will also receive a confirmation email with further details. City staff will review the reporting and may contact you if further information is required. Once approved, the property will be disassociated with your account, but the information on the property and units will be retained in the portal for future use by the new property owner.

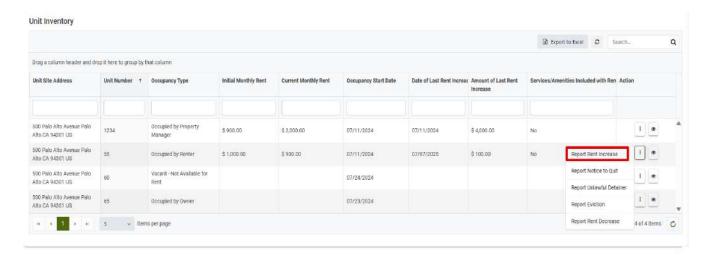




REQUIRED REPORTING OF EVENTS

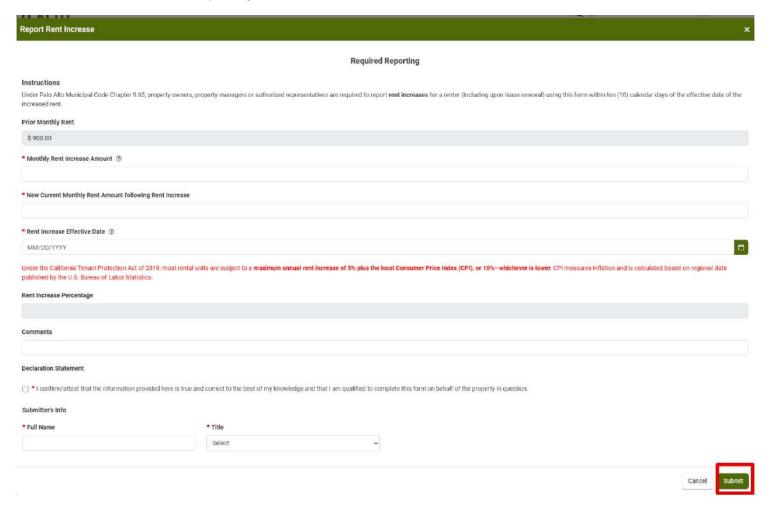
Report Rent Increase

1. From your portal dashboard, open the **Property Overview** page for the unit where the rent increase applies. In the **Unit Inventory** section, locate the unit and click the **three vertical dots** on the right. A list of available actions will appear. Click on the "Report Rent Increase" menu option.





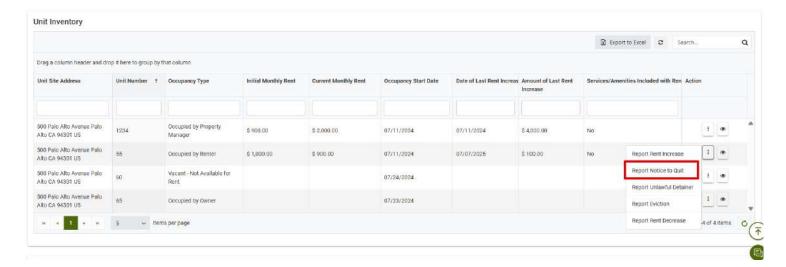
2. The Report Rent Increase form will open. Carefully read the instructions, complete all the form fields (required fields are marked with a red asterisk), and click **Submit**. No document uploads are needed for rent increase reporting.



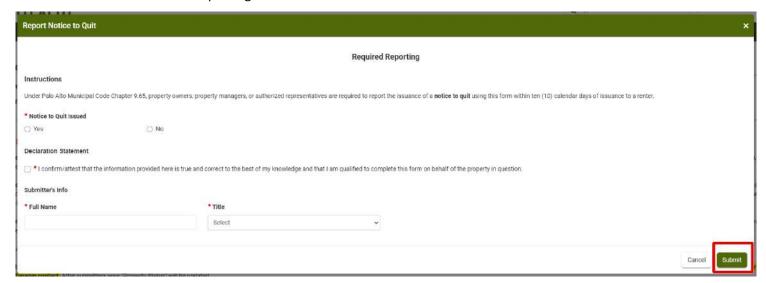


Report Notice to Quit

 From your portal dashboard, open the **Property Overview** page for the unit where the notice to quit applies. In the **Unit Inventory** section, locate the unit and click the **three vertical dots** on the right. A list of available actions will appear. Click on the "Report Notice to Quit" menu option.



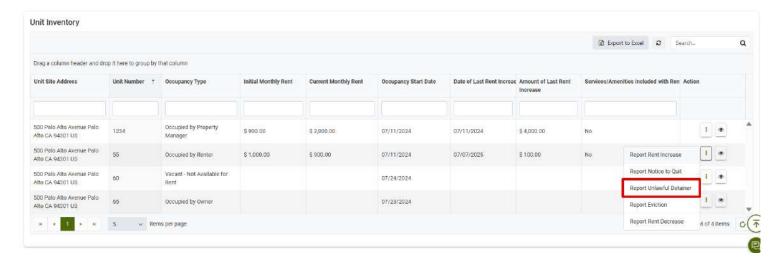
2. The Report Notice to Quit form will open. Carefully read the instructions, complete all the form fields (required fields are marked with a red asterisk), and click **Submit**. No document uploads are needed for Notice to Quit reporting.



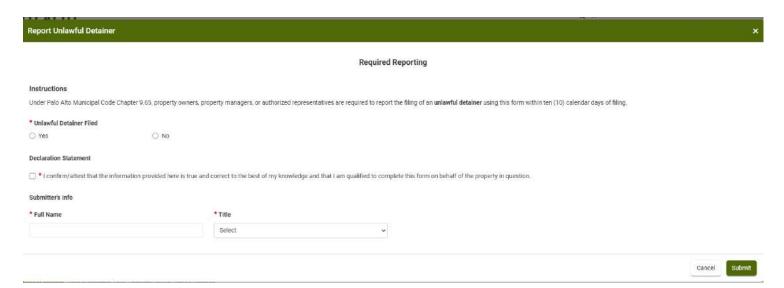


Report Unlawful Detainer

From your portal dashboard, open the Property Overview page for the unit where the unlawful
detainer applies. In the Unit Inventory section, locate the unit and click the three vertical dots on
the right. A list of available actions will appear. Click on the "Report Unlawful Detainer" menu option.



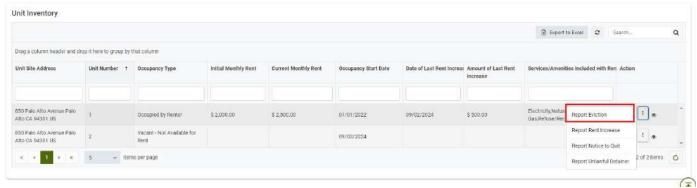
2. The Report Unlawful Detainer form will open. Carefully read the instructions, complete all the form fields (required fields are marked with a red asterisk), and click **Submit**. No document uploads are needed for Unlawful Detainer reporting.



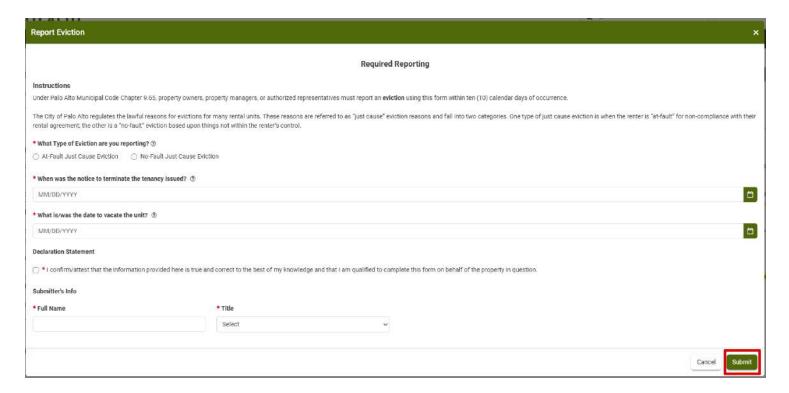


Report Eviction

From your portal dashboard, open the Property Overview page for the unit where the eviction occurred. In the Unit Inventory section, locate the specific unit and click the three vertical dots on the right. A list of available events will appear. Click the "Report Eviction" menu option.



2. The "Report Eviction" form will open. Carefully read the instructions, then select the eviction type: *At Fault Just Cause* or *No Fault Just Cause*. Complete all the form fields (required fields are marked with a red asterisk) and click **Submit**. No document uploads are needed for Eviction reporting.



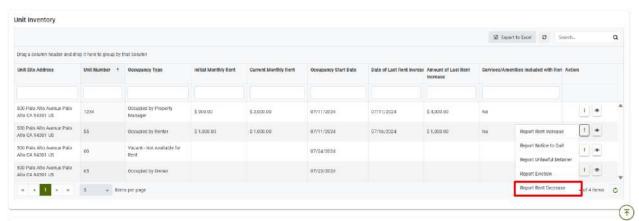


OPTIONAL REPORTING OF EVENTS

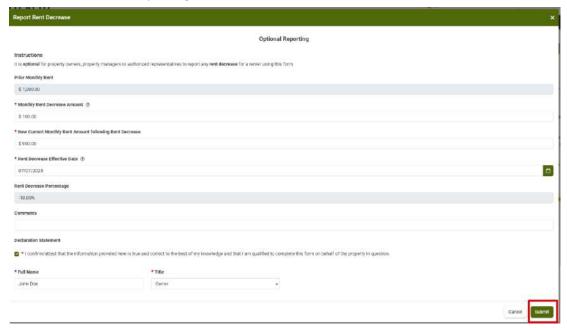
In response to requests by rental property owners and property managers, the Rental Registry Program online portal can also be used to optionally report additional events, such as a Rent Decrease.

Report Rent Decrease

 From your portal dashboard, open the **Property Overview** page for the unit where the rent decrease occurred. In the **Unit Inventory** section, locate the specific unit and click the **three vertical dots** on the right. A list of available events will appear. Click the "Report Rent Decrease" menu option.



 The Report Rent Decrease form will open. Carefully read the instructions, complete all the form fields (required fields are marked with a red asterisk), and click **Submit**. No document uploads are needed for Rent Decrease reporting.





THANK YOU!