

CHAIS Document Management System User Guide



THE AGENCY FOR CO-OPERATIVE HOUSING
L'AGENCE DES COOPÉRATIVES D'HABITATION

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Overview

The CHAIS Document Management System is a secure, web-based platform used by co-ops, management companies, auditors and Agency staff to upload and manage AIR-related and other documents.

Your co-op's Annual Information Return is due four months after your fiscal year end. Before your auditor can file your AIR, specific documents must be uploaded to CHAIS. For most clients, the only document required is your audited financial statements. Either your co-op or your auditor can submit this.

Once the required documents are submitted, the Agency will review them for completeness and accuracy before accepting them. If they are not complete and accurate, we will reject the document. If this happens, you will receive an email that includes the reason for rejection. You will then have an opportunity to re-submit the corrected document.

When the Agency has accepted all required documents, your auditor can proceed with filing your AIR.

What's new?

- In the past co-ops or auditors submitted their AIR-related documents by email. Now they upload them directly to CHAIS.
- Required documents must now be submitted and accepted by the Agency before an AIR can be filed.

How to Upload Documents

Management Company Users and Auditors

When a management-company or auditor logs into CHAIS, they will first see a list of all co-operatives they are associated with.

To navigate to the upload section for the AIR document:

- Select the appropriate co-op from the list.
- You will be taken to the Welcome Page for that co-op.
- Click the "Reports" tile.
- From the Reports page, select the "Annual Information Return (AIR)" tab.
- Locate the AIR for the fiscal year you are working on and click the "Manage Documents" icon.
- Follow the steps described in this guide to upload or manage documents.

All Users

All users (including management-company users) must ensure that the audited financial statements (AFS)

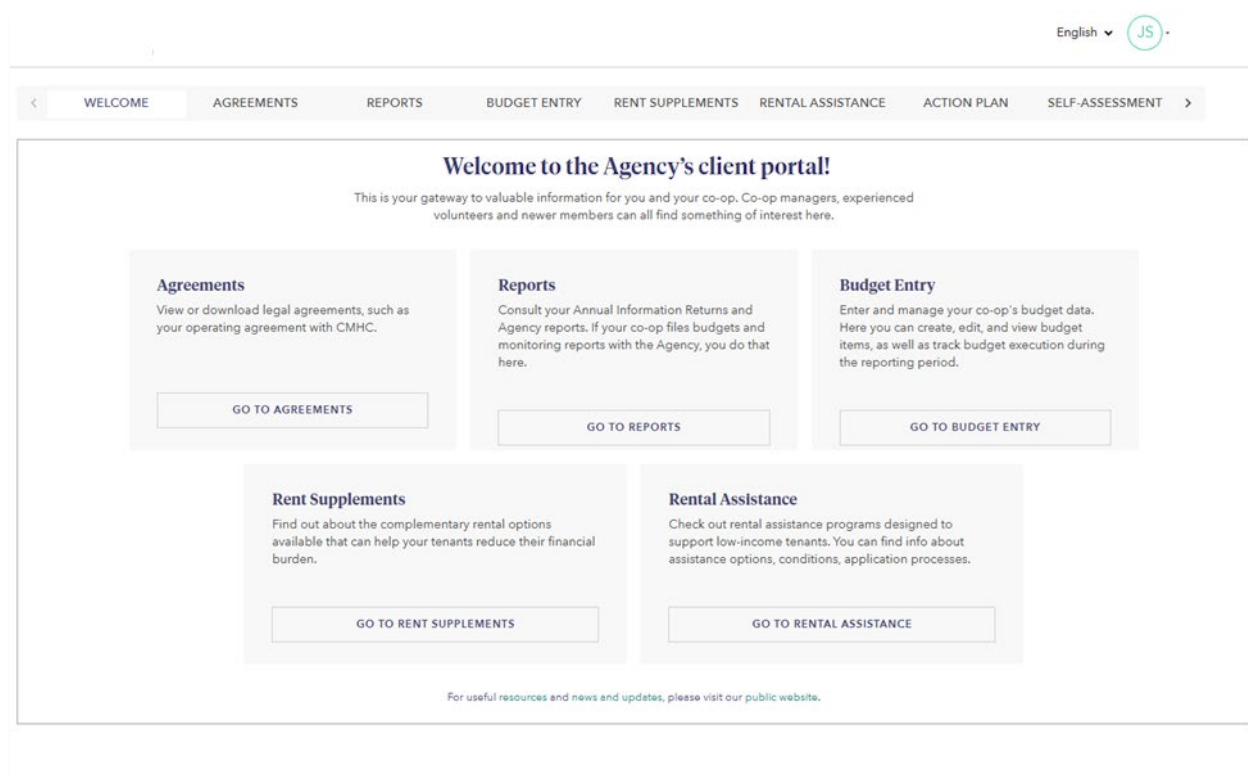
- are signed by two directors of the co-operative
- are complete and for the correct fiscal year and include all required pages

Exception for Auditors:

Auditors may submit unsigned AFS provided they confirm the statements are final.

Navigating to the AIR Page

- Log in to CHAIS with your username and password.
- On the **Welcome** page, click in the **Reports** tile, or on the **Reports** tab at the top.



Screenshot: Welcome page

- On the **Reports** page, click the **Annual Information Return** tab.

- On the **Annual Information Return** page, you'll see a list of AIR records for your co-op, organized by fiscal year.

<
WELCOME
AGREEMENTS
REPORTS
BUDGET ENTRY
RENT SUPPLEMENTS
RENTAL

Reports

This page will take you to the reports that Agency prepares for your co-op each year.

ANNUAL INFORMATION RETURN
BUDGET
COMPLIANCE REVIEWS
MONITORING REPORTS
PERFORMANCE

Fiscal Year Ended	AIR Status	Status Date	Actions
28 Feb 2025	In Progress	21 Aug 2025	
29 Feb 2024	Validated	24 Sep 2024	
28 Feb 2023	Validated	13 Jun 2023	
28 Feb 2022	Validated	29 Jun 2022	
28 Feb 2021	Validated	24 Nov 2021	
29 Feb 2020	Validated	07 Aug 2020	
28 Feb 2019	Validated	25 Jul 2019	
28 Feb 2018	Validated	08 Aug 2018	
28 Feb 2017	Validated	11 Aug 2017	
29 Feb 2016	Validated	11 Aug 2016	

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Screenshot: Annual Information Return page

What do the icons mean?	
	Go to the "Manage Documents" page
	View a document
	Upload a document
	Delete a document (available only when status is "Pending Acceptance")

Your AIR is due four months after your co-op's fiscal year end. Required documents must be uploaded and accepted before your AIR can be filed. Ensure you submit these documents early to allow enough time for review and approval by the Agency.

📁 Uploading Documents

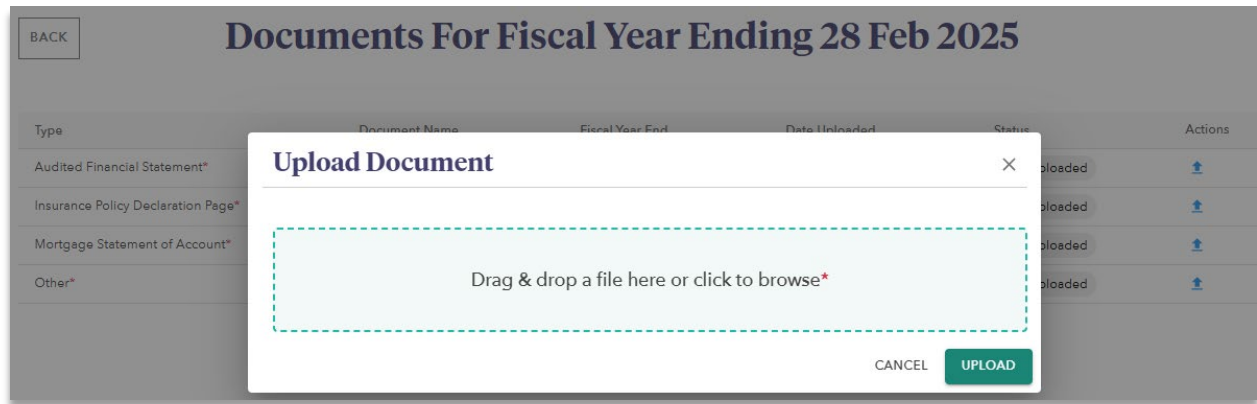
- On the **Annual Information Return** page, locate the relevant AIR and click the **Manage Documents** icon beside it.
- Required documents will be marked with a red asterisk. In most cases the only required document will be your audited financial statements. But you also have the option to upload other documents.

<	WELCOME	AGREEMENTS	REPORTS	BUDGET ENTRY	RENT SUPPLEMENTS	RENTAL ASSISTANCE	ACTION PI
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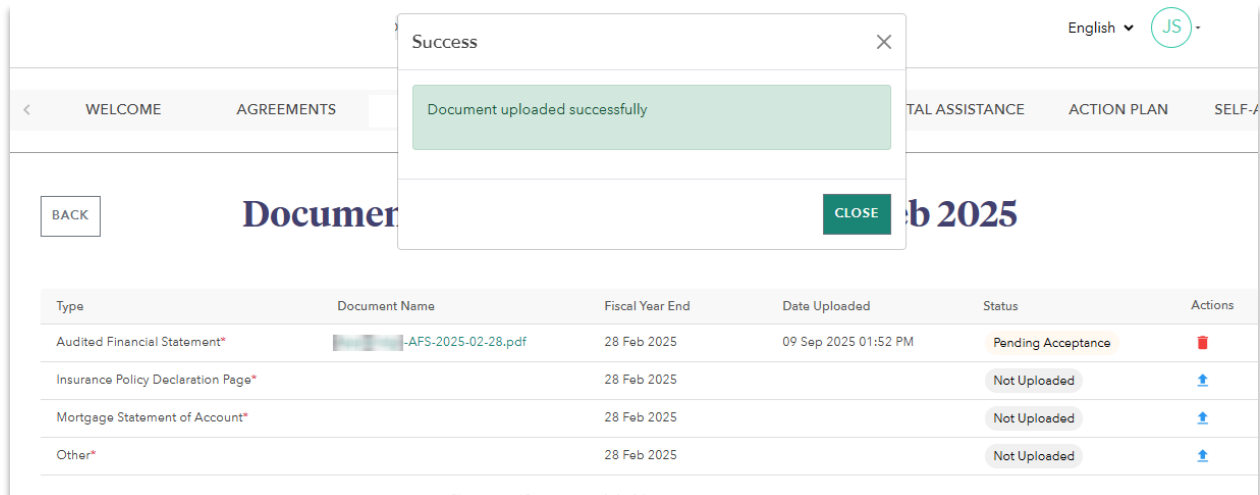
BACK	Documents For Fiscal Year Ending 28 Feb 2025				
Type	Document Name	Fiscal Year End	Date Uploaded	Status	Actions
Audited Financial Statement*		28 Feb 2025		Not Uploaded	📁
Insurance Policy Declaration Page*		28 Feb 2025		Not Uploaded	📁
Mortgage Statement of Account*		28 Feb 2025		Not Uploaded	📁
Other*		28 Feb 2025		Not Uploaded	📁
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Screenshot: Manage Documents

- For the appropriate document type, click the **Upload Document** icon. 📁
 - Click the upload box to browse and locate the file on your computer.
 - Click **Upload** to submit the document.
 - The system will automatically rename your document based on our naming convention. The name will include the co-op name, document type and fiscal year end date.
- You may also drag and drop your file into the green box, then click the **Upload** button.
- A confirmation message will appear once the upload is successful.



Screenshot: Upload a Document



Screenshot: Successful Document Upload

Uploading “Other” Documents

In addition to the required documents listed on the AIR page, co-ops may upload other supporting documents. If your document type isn’t listed, you can upload a document with the document type **Other**.

Steps to upload an "Other" Document:

- Navigate to the **Manage Documents** screen for the relevant AIR.
- Scroll down to document type **Other**.
- Click the **Upload** button.

Screenshot: Upload Other type of Document

A form will appear prompting you to enter **Document Name** (required). Enter a clear and descriptive title that includes the name of your co-op, the document name and the fiscal year, such as BestLife Co-op Trial Balance 2025.

Some rules about file names:

- Must **not exceed 100 characters**
- Must **not contain** any of the following characters: \\ / : * ? " < > |
- Must **not begin or end** with a space or a period (.)

- Click **Browse** to locate the file on your computer or drag and drop the file into the pop-up.
- Select the file name.
- Click **Upload** to attach the document to the file name.
- A confirmation message will appear once the document has been uploaded.
- The uploaded document will appear with the document type **Other**, showing the name you entered.

The Agency will review all uploaded documents. If they meet the requirements, we change their status to Accepted. If a document is rejected, we give the reason.

Rejected Documents

If a document you submitted is rejected, follow these steps to correct and resubmit:

- Locate the rejected document on the **Manage Documents** page. Its status will appear as “Rejected”.
- The **Reason** for rejection will be displayed between the **Status** and **Actions** columns.

Some reasons why we would reject a document:

- Statements are for the wrong fiscal year end
- Pages are missing from the document
- Statements submitted by a co-op are not signed by two directors – this requirement is waived if your auditor is submitting

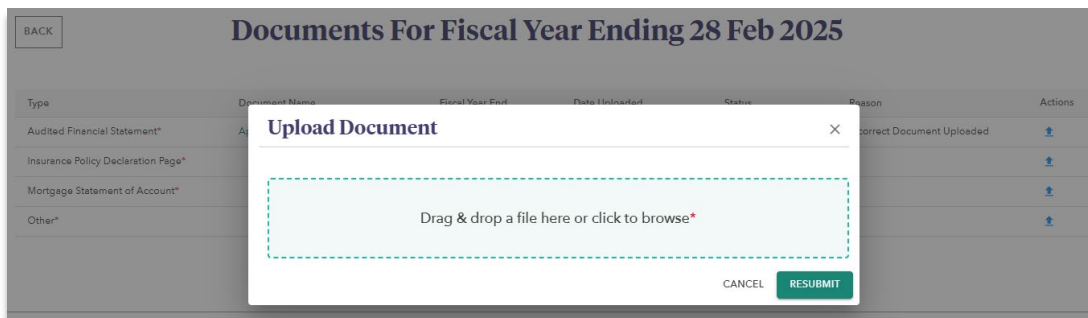
- Hover your cursor over the reason for rejection to view detailed comments from the Agency reviewer.



Type	Document Name	Fiscal Year End	Date Uploaded	Status	Reason	Actions
Audited Financial Statement*	Applendge-AFS-2025-02-28.pdf	28 Feb 2025	09 Sep 2025 01:52 PM	Rejected	Incorrect Document Uploaded	
Insurance Policy Declaration Page*		28 Feb 2025		Not Uploaded		
Mortgage Statement of Account*		28 Feb 2025		Not Uploaded		

Screenshot: Rejected Document

- When you are ready to upload the corrected version of the document, return to the **Manage Documents** page and locate the rejected document. The “Upload” button will remain visible for the rejected document.
- Click the **Upload** icon, then drag and drop the corrected file or use the file browser to select it.
- Click **Resubmit** to complete the resubmission.
- Confirm that the status now displays **Pending Acceptance**.



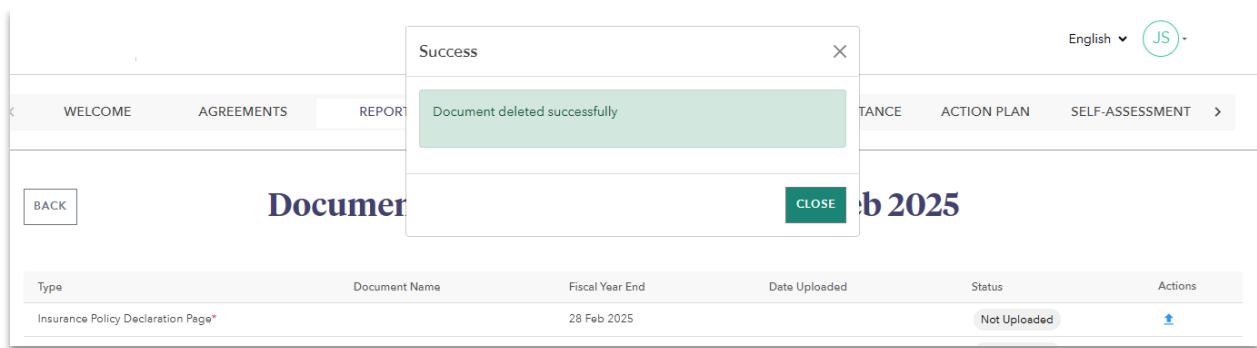
Screenshot: Resubmit Document

Deleting a Pending Document

You can delete a document **only if its status is Pending Acceptance** (i.e., it has not yet been reviewed and accepted by the Agency).

Follow these steps:

- Navigate to the **Manage Documents** screen.
- Locate the document with the status **Pending Acceptance**.
- Click the **Delete Document** (trash bin) icon next to the document name.
- The document will be permanently removed from the list.



Screenshot: Confirmation of Document Deletion

Helpful information

Understanding Document Status

Each document in the system displays a status to help you track its progress:

- **Pending Acceptance**
The document has been uploaded and is awaiting review by the Agency.
- **Accepted**
The document has been reviewed and approved. No further action is required.
- **Rejected**
The document was reviewed but not accepted. Comments from the reviewer will explain the reason, and you will be required to correct and re-upload it.
- **Overdue**
Neither the document nor the AIR has been submitted by the AIR filing deadline (four months after the fiscal year end). Immediate action is needed to upload or complete the document submission so the AIR can be filed.

FAQ

Q: What if I don't know my CHAIS username and password?

A: Contact the manager at your co-op. If you are the manager, your contact at the Agency can help.

Q: What types of files can I upload?

A: You can upload Word, Excel and PDF documents.

Q: How do I know if my submission was successful?

A: You'll receive a confirmation message, and the document status will be **Pending Acceptance**.

Q: What if my file won't upload?

A: Ensure the file is a Word, Excel or PDF document and does not exceed size limits. Try refreshing the page. If the problem persists, contact our Help Desk [here](#).


Q: Can I re-upload a document after it's accepted?

A: No. Once a document is accepted, it is finalized. Contact your Agency contact if changes are needed.

Q: Can I delete a document that has already been accepted?

A: No. Only documents with **Pending Acceptance** status can be deleted. Contact the Agency if you need to change something.

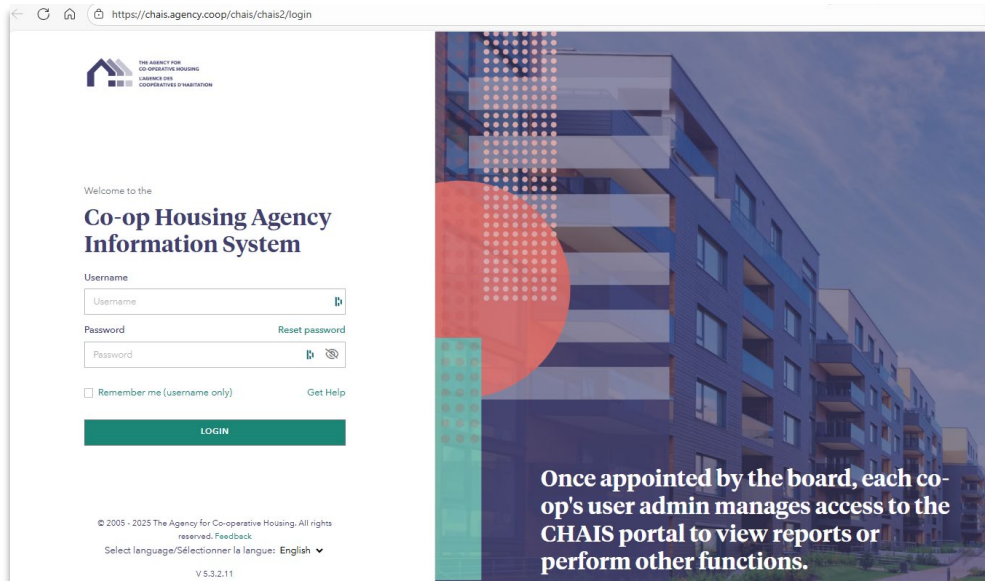
Q: How can I get help?

A: For technical help, click on the  at the bottom right of each page or follow this [link](#). This will take you to our Help Desk.

Screenshot Walkthrough

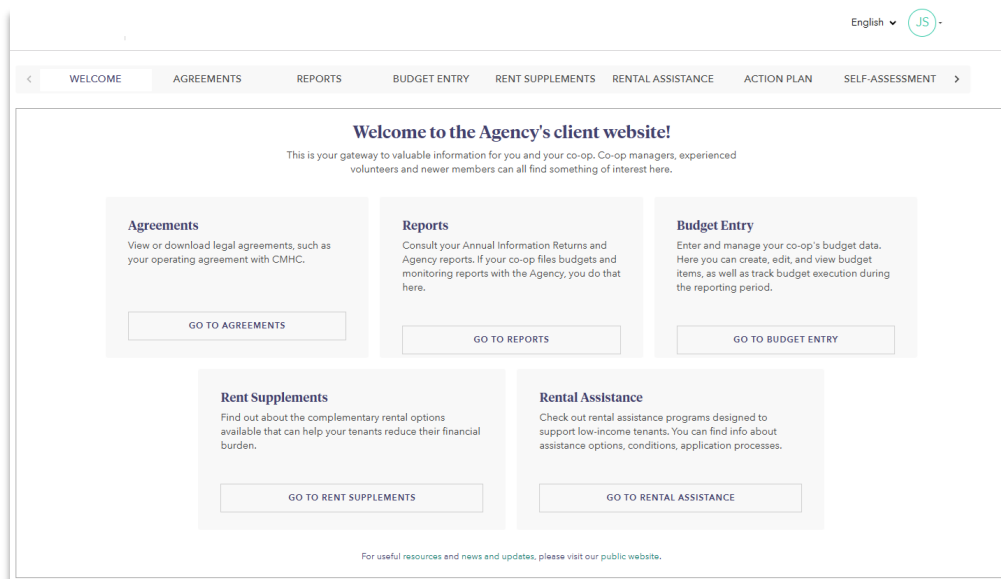
Below are the key steps in the document process, each paired with screenshots as your visual guide to the CHAIS document management system.

Login Page



The screenshot shows the login page of the Co-op Housing Agency Information System. The page has a white background with a green header bar. The header bar contains the agency's logo and name: "THE AGENCY FOR CO-OPERATIVE HOUSING / L'AGENCE DES COOPÉRATIVES D'HABITATION". Below the header, there is a "Welcome to the" message followed by the title "Co-op Housing Agency Information System". The login form includes fields for "Username" and "Password", a "Remember me (username only)" checkbox, and a "Get Help" link. A green "LOGIN" button is at the bottom of the form. To the right of the form is a large image of a modern apartment building with a red and blue graphic overlay. Below the image, there is a text box that reads: "Once appointed by the board, each co-op's user admin manages access to the CHAIS portal to view reports or perform other functions." At the bottom of the page, there is a copyright notice: "© 2005 - 2025 The Agency for Co-operative Housing. All rights reserved. Feedback." and a language selector: "Select language/Sélectionner la langue: English".

Welcome Page



The screenshot shows the welcome page of the CHAIS portal. The page has a white background with a green header bar. The header bar contains the language selector "English" and a "JS" icon. Below the header, there is a navigation bar with links: "WELCOME", "AGREEMENTS", "REPORTS", "BUDGET ENTRY", "RENT SUPPLEMENTS", "RENTAL ASSISTANCE", "ACTION PLAN", and "SELF-ASSESSMENT". The main content area is titled "Welcome to the Agency's client website!" and includes a sub-header: "This is your gateway to valuable information for you and your co-op. Co-op managers, experienced volunteers and newer members can all find something of interest here." Below this, there are five cards, each with a title, a description, and a "GO TO" button. The cards are: "Agreements" (View or download legal agreements, such as your operating agreement with CMHC), "Reports" (Consult your Annual Information Returns and Agency reports. If your co-op files budgets and monitoring reports with the Agency, you do that here.), "Budget Entry" (Enter and manage your co-op's budget data. Here you can create, edit, and view budget items, as well as track budget execution during the reporting period.), "Rent Supplements" (Find out about the complementary rental options available that can help your tenants reduce their financial burden.), and "Rental Assistance" (Check out rental assistance programs designed to support low-income tenants. You can find info about assistance options, conditions, application processes.). At the bottom of the page, there is a footer: "For useful resources and news and updates, please visit our public website."

Annual Information Return

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WELCOME

AGREEMENTS

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BUDGET ENTRY

RENT SUPPLEMENTS

RENTAL ASSISTANCE

ACTION PLAN

Reports

This page will take you to the reports that Agency prepares for your co-op each year.

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28 Feb 2019	Validated	25 Jul 2019	
28 Feb 2018	Validated	08 Aug 2018	
28 Feb 2017	Validated	11 Aug 2017	
29 Feb 2016	Validated	11 Aug 2016	

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Manage Document

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WELCOME

AGREEMENTS

REPORTS

BUDGET ENTRY

RENT SUPPLEMENTS

RENTAL ASSISTANCE

ACTION PLAN

BACK

Documents For Fiscal Year Ending 28 Feb 2025

Type	Document Name	Fiscal Year End	Date Uploaded	Status	Actions
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Mortgage Statement of Account*		28 Feb 2025		Not Uploaded	
Other*		28 Feb 2025		Not Uploaded	

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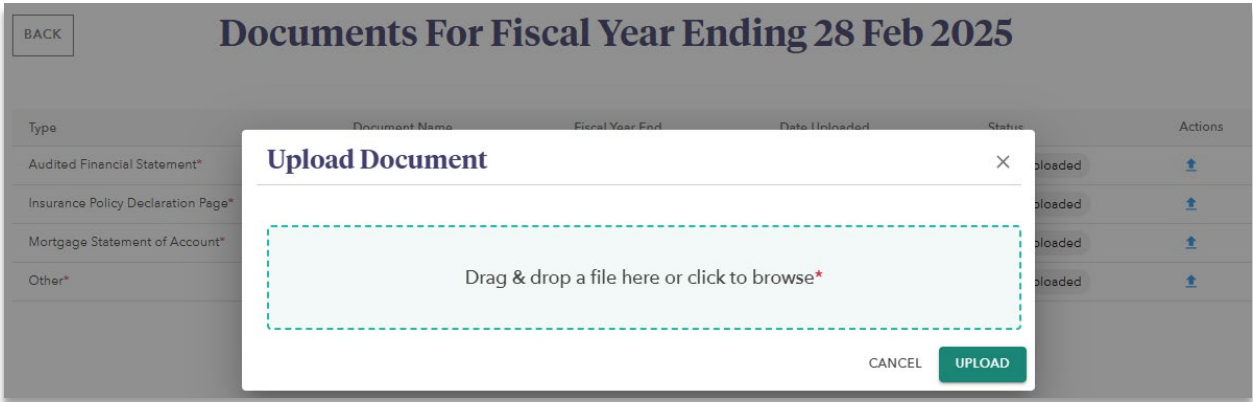
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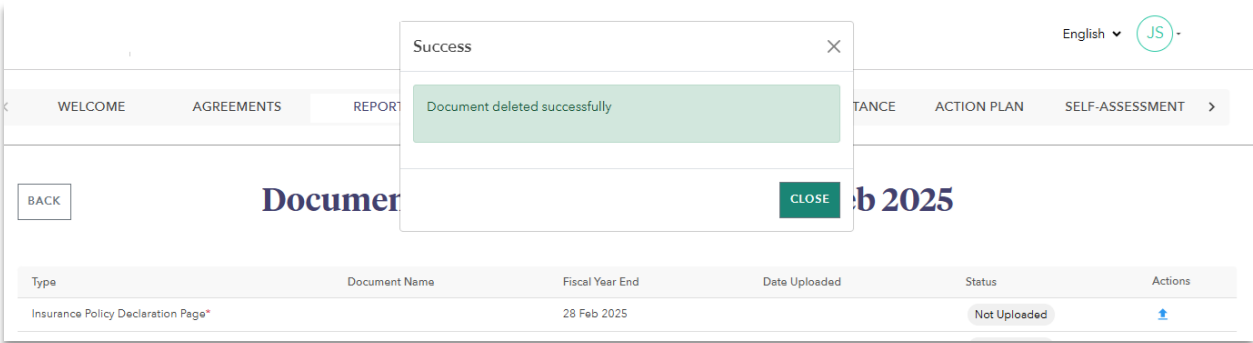
Upload Document



Document Rejected



Delete Document



Status View

Type	Document Name	Fiscal Year End	Date Uploaded	Status	Reason	Actions
Audited Financial Statement*	Beckley Farm-AFS-2025-04-30.pdf	30 Apr 2025	09 Sep 2025 03:46 PM	Accepted		
Insurance Policy Declaration Page*	Beckley Farm-Insurance Policy-2025-04-30.pdf	30 Apr 2025	09 Sep 2025 03:46 PM	Rejected	Document Uploaded For Wrong Year	↑
Mortgage Statement of Account	Beckley Farm-MSA-2025-04-30.pdf	30 Apr 2025	09 Sep 2025 03:46 PM	Not Needed		↓
Other*		30 Apr 2025		Not Uploaded		↑

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