# HDS NEXTGEN MULTIFAMILY

User Guide v3.0.0

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Housing and Development Software
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Miami Lakes, FL 33014.

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HDS is a division of Housing and Development Services, Inc.
For more information on HDS products, services, or documentation, please contact Housing and Development Software at sales@hdsoftware.com or call us at (888) 326-7680**.**

# Overview

This user guide contains all essential information for external users to make full use of this application. It includes descriptions of system functions and capabilities, contingencies and step-by-step procedures for system access and use.

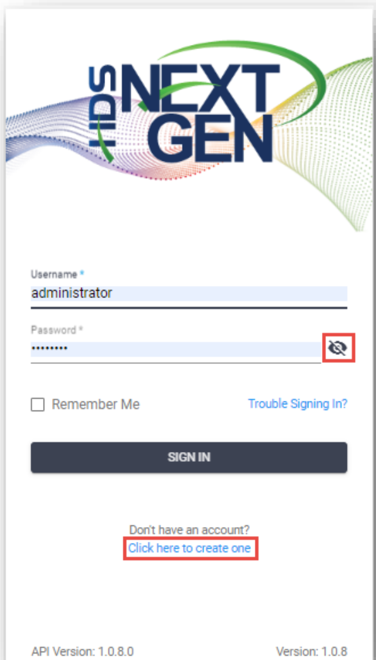
## Points of Contact

This user guide along with the abovementioned tools are to be used as points of reference or assistance for specific areas of the system. As is customary, HDS support staff are always prepared and available to assist. For any questions or additional assistance, please contact your support representative at the Housing Authority.

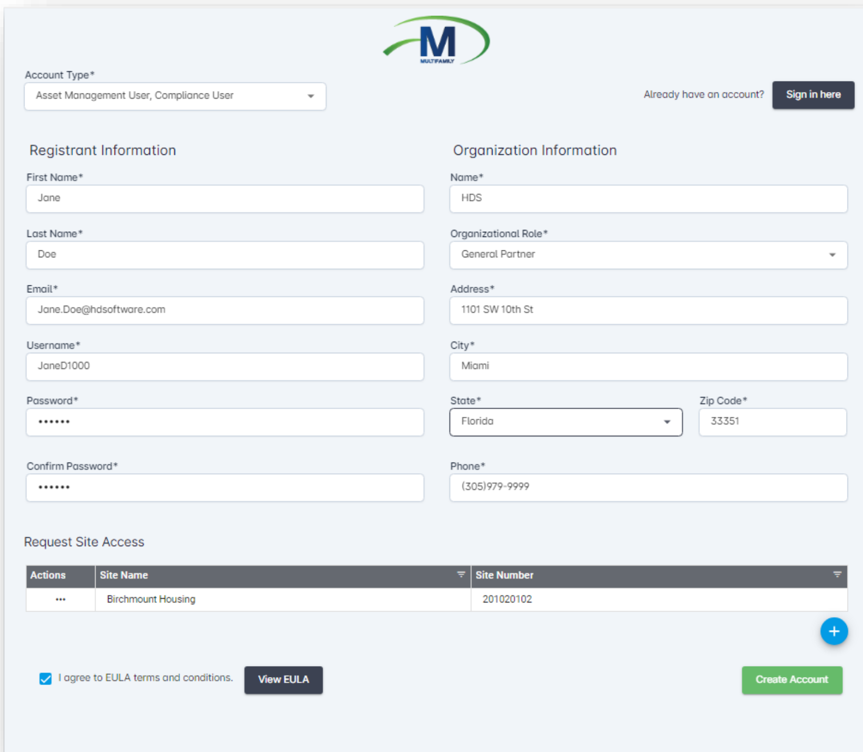
# Getting Started

# Registration

1. To register for the NextGen Web Portal access the agency's URL.
2. *Click here to create one* from the login screen to create a new registration.



3. Select an *Account Type*.
4. Populate the required fields that contain an *asterisk*.

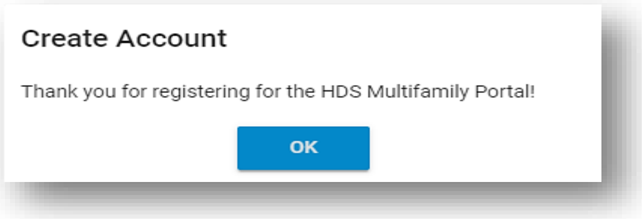



**IMPORTANT NOTE**

To associate a *Site* to a user's profile, click the plus button under the Request Site Access. Enter the Site Name and Site Number then click Add Site.

To remove the Site access request, select Delete from the Actions menu.

5. To review the terms expressed in the EULA, select View EULA.
6. Then check *I agree to EULA terms and conditions* checkbox.
7. Once you've completed the form, select *Create Account*.



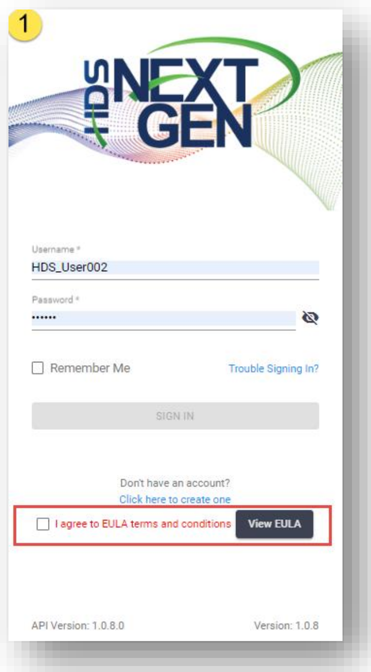

**IMPORTANT NOTE**

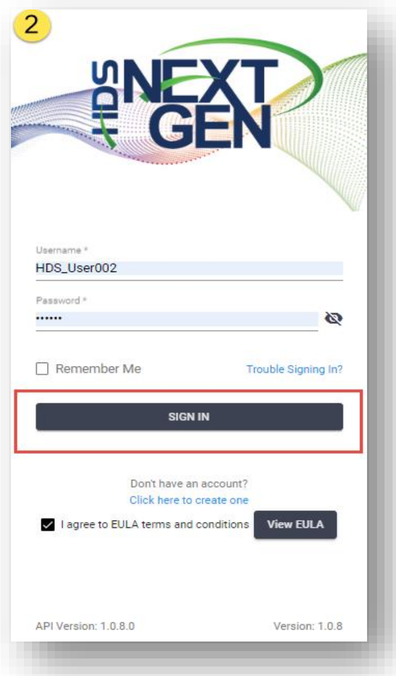
Registered users will receive a notification via email indicating the registration process has been completed.

User Registration must be approved by the agency prior to accessing the system.

# Access to MF NextGen Portal

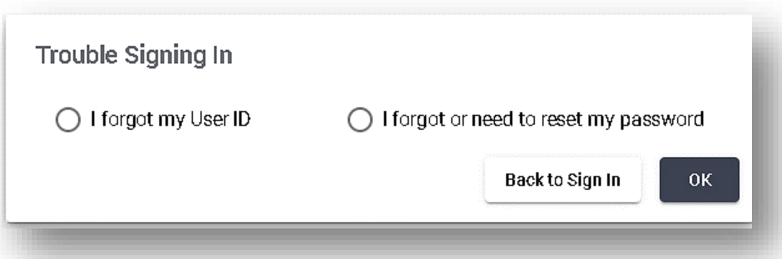
Once your registration has been approved, return to the login page to enter your user credentials. You must review and agree to the *End-User License Agreement (EULA)* before accessing the system for the first time, and each time the *EULA* is updated. The sign-in will become enabled after you select, *I agree to EULA Terms and Conditions*. Once selected, access to the HDS NextGen Multifamily Web Portal will be granted. The *Remember Me* checkbox is then visible, providing the option to log in without typing in user credentials.



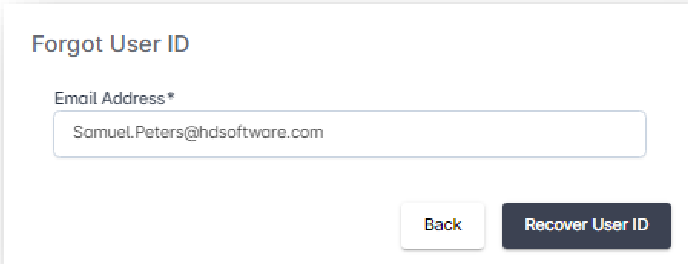

## Forgot Password/Username

To retrieve your username or create a new password, click *Trouble Signing In?*



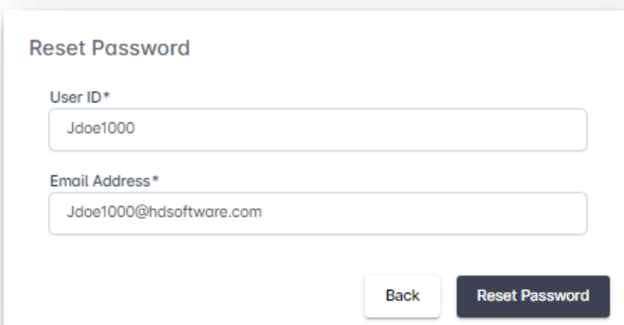
### User ID

1. Click the *I forgot my User ID* option.
2. Enter the *Email Address* associated with the User ID.
3. Click *Recover User ID*.
4. The User ID will be sent to the email address of the registrant.

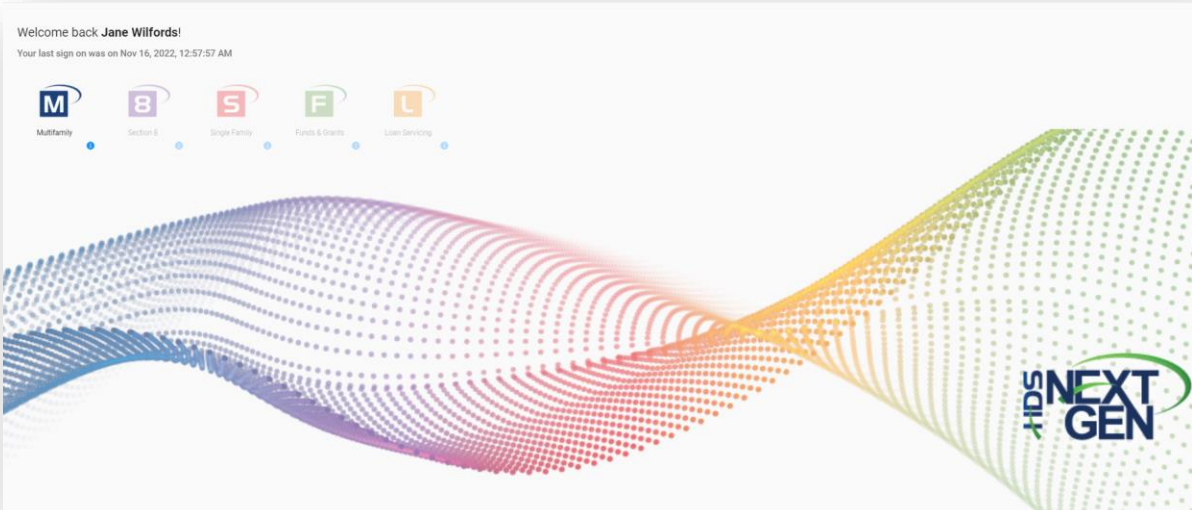



### Forgot Password

1. Click the *I forgot or need to reset my password* option.
2. Enter the User ID and Email Address.
3. Click *Reset Password*.
4. An email with instructions to create a new password will be sent to the email address of the registrant. Click *Back to Sign In* to return to the previous page




Once you've logged into the system, you will see the NextGen multiproduct entry page. Select the Multifamily icon to access the system.




## Dashboard

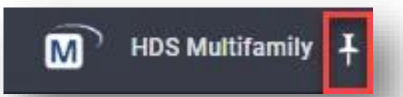
The *Dashboard* displays a view of the *Vacant Units by Site*. The Site dropdown list is populated based on the sites associated with a user's login. The system will display the number of Occupied and Vacant Units when a site has been selected. The data can be exported into PNG, *JPEG,PDF,* and *SVG* file formats.

## Navigation Tools

Navigation tools help you maneuver the system with minimal effort. The toolbar is used for quick access to different areas and to help personalize your work area.

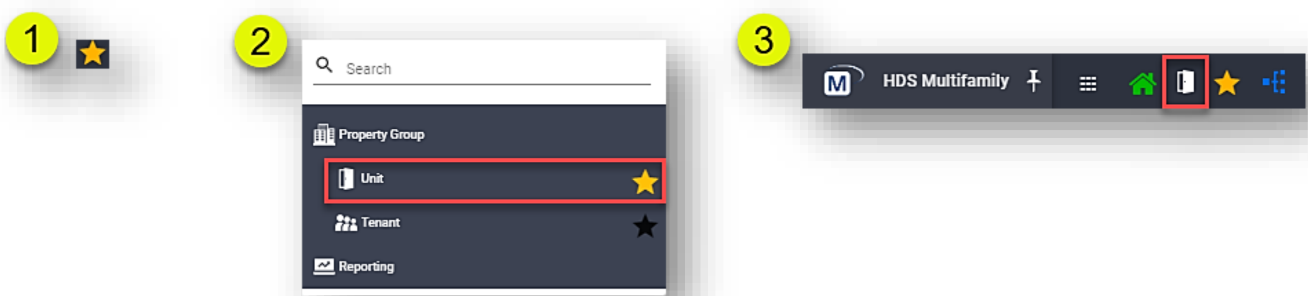
### Toolbar Icons

To manage the size of your workspace, use the **Pin** on the left side of the Toolbar. Hide the *Areas* menu by clicking the pin and moving the mouse away from the icon. The names of the work areas will no longer be visible, but their icons will still be displayed. To see the full menu, click the pin again.



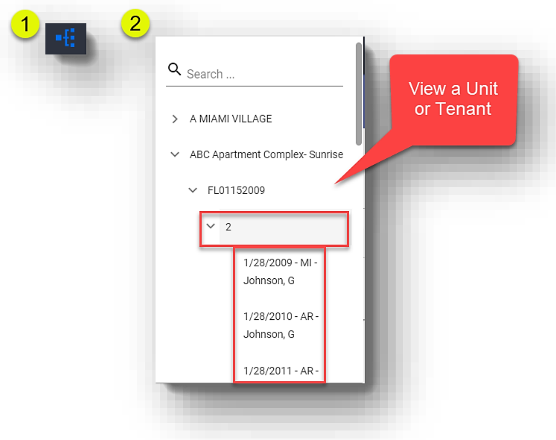

To return to the NextGen multi-product page, click . On this page, you can select a different NextGen program or view the date/time of your last sign on.

You can create shortcuts to frequently visited work areas by clicking **Favorites** and selecting the desired area(s) from the drop-down. The star indicates that your option(s) has been saved.




Remove shortcuts by clicking on the selected option(s) in the *Favorites* menu.

To access the Units and Tenants from the toolbar, click 

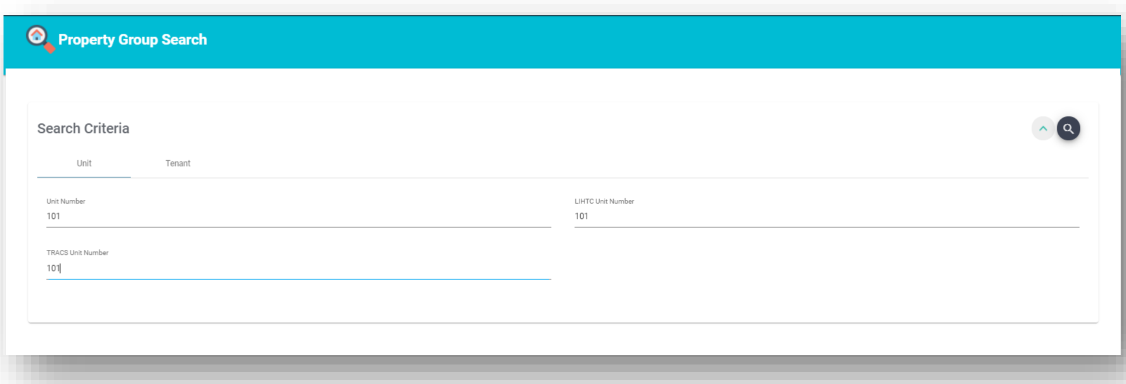



## Property Group Search

This area allows users to search for *Unit* and *Tenant* records without accessing each search area individually.

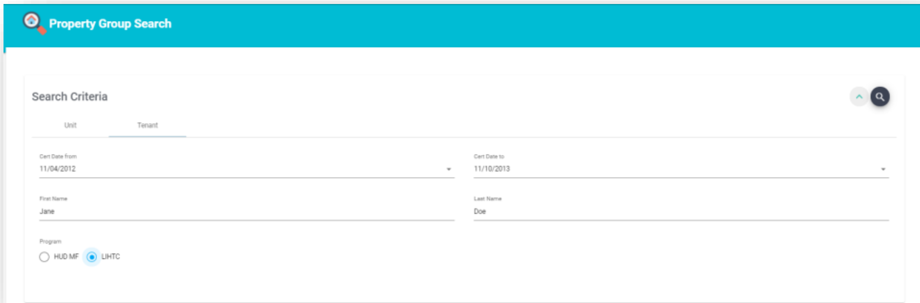
### Unit

1. Enter the search criteria into the *Unit Number, LIHTC Unit Number* or *TRACS Unit Number* fields.
2. Click the search icon to return to display search results.




### Tenant

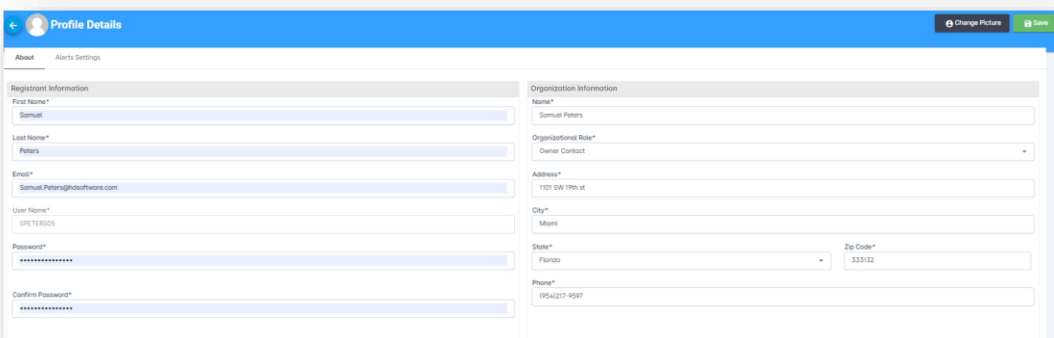
1. Select a *Cert Date* and *Cert Date To* fields or
   enter the *First* and *Last Name* of the Tenant Member.
2. Select a *HUD MF* or *LIHTC* Program.
3. Click Search icon to view results.




## User Profile

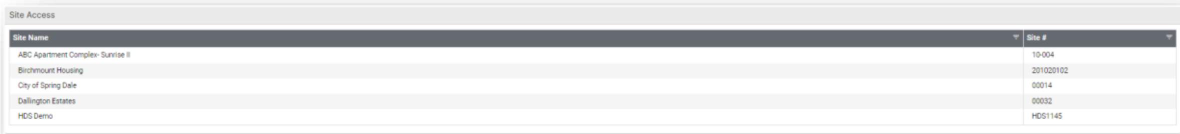
### Profile

The user profile can be accessed by clicking on user’s name in tool bar. The *Profile Details* shows the information used to create your NextGen account. In this area, you can view and modify your personal information, update details of your company and configure the system to receive alerts. The Username field is not editable and will remain disabled.



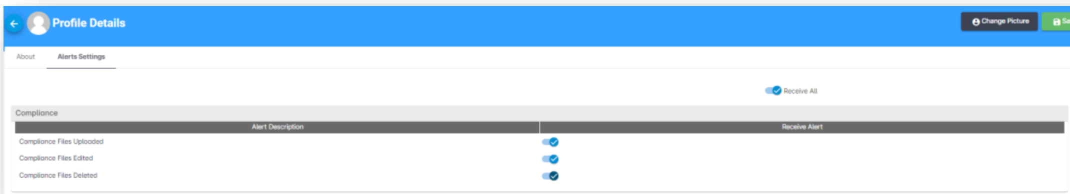
## Site Access

This area is read-only. In the Site Access area are the sites you've requested access or been assigned to by an agency team member. When you've completed your changes to the Profile Details, click *Save* .




## Alert Settings

From this area users can configure the system to receive an alert if a file has been *Uploaded, Edited, or Deleted*.



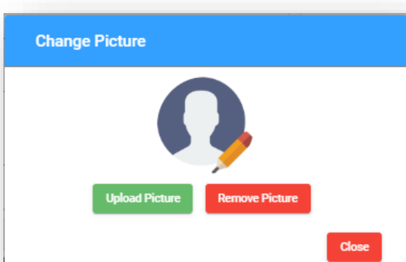

### Configuration Alert Settings

1. Choose the desired Alert.
2. Then check the *Receive Alert* box.
3. Click *Save* to complete your actions.

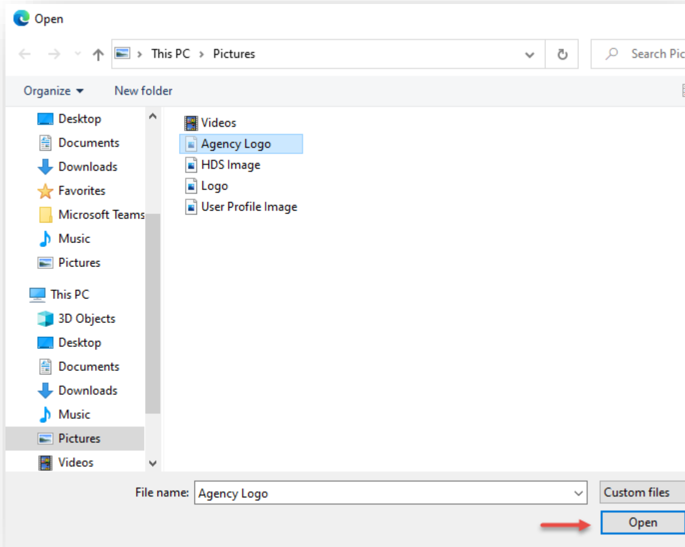
| **IMPORTANT NOTE** |
| --- |
| Users can select each individual alert or click *Receive All* to enable all alerts.<br>Alert Notifications will be visible via the notification bell icon. |

### Adding Profile Image

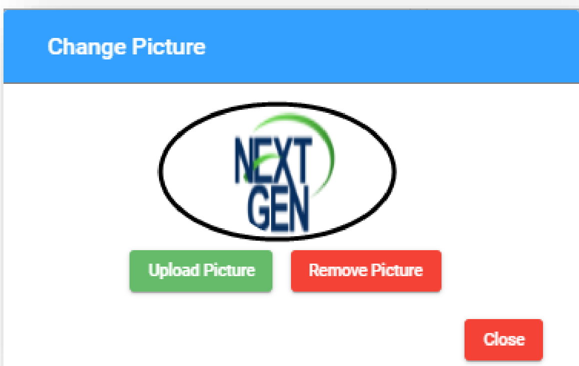
1. To associate an image to a user profile, click the *Change Picture* button.




2. From *Change Picture* popup click *Upload Picture.*



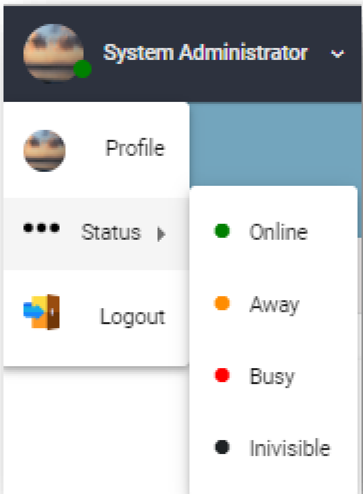

3. Choose the file you wish to upload from the selected directory and click *Open*.




4. The newly added image will be added. Click the *Close* button. The image will now appear next to the user's profile name.

## User Profile Status

A status of *Online*, *Away*, *Busy,* or *Invisible* can be assigned to the user's profile.

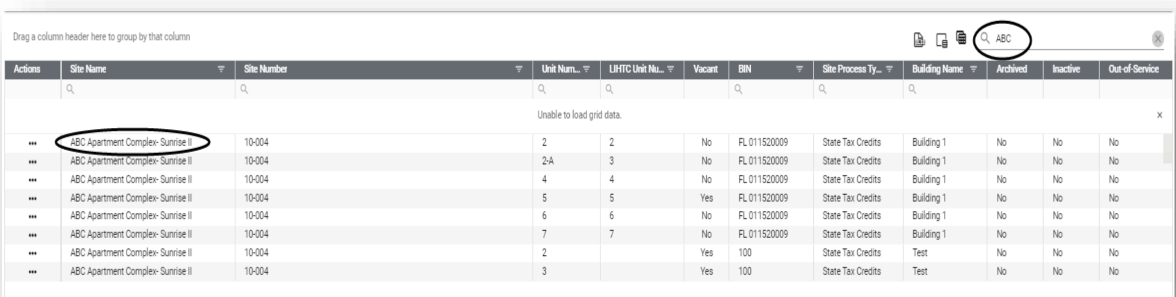



1. Click on Status and select the status that applies.
2. The status selected will be displayed next to the username.

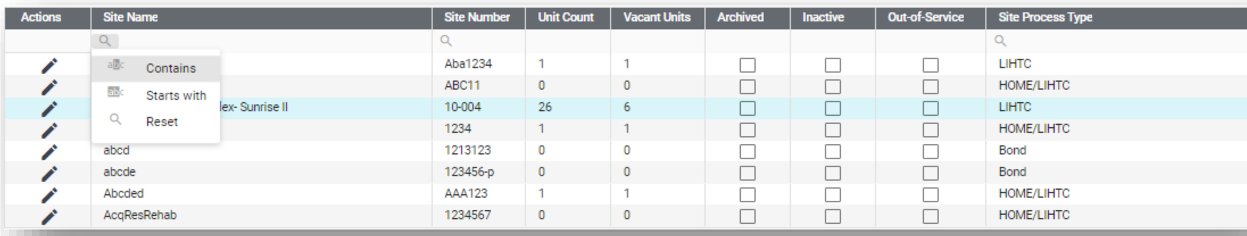
# Grid Functionality

Grids are used to organize and display data throughout the NextGen application.  Although the grids do not provide the same data, they function uniformly. Below, we demonstrate how grids operate in different areas of the system. You will know the capabilities of a grid by identifying the icons of the options described in this section.

The quick search is located on the right-side of the grid. You can perform a keyword search with alphanumeric values. The system will retrieve relevant results in the row(s) below.



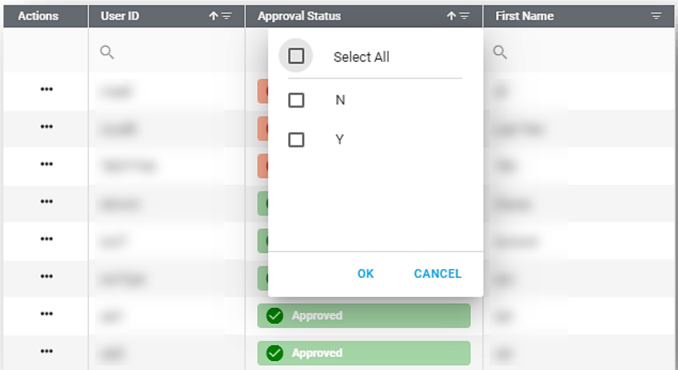

Keyword searches can also be performed from within the grid. Click the search icon to view filter options. The system can retrieve records that contain or start with keywords or characters. Select *Reset* to refresh the search.




To sort the data in a column, click anywhere in the header. The upward facing arrow indicates that the information is in ascending order. When the arrow is pointing downward, the information is in descending order.

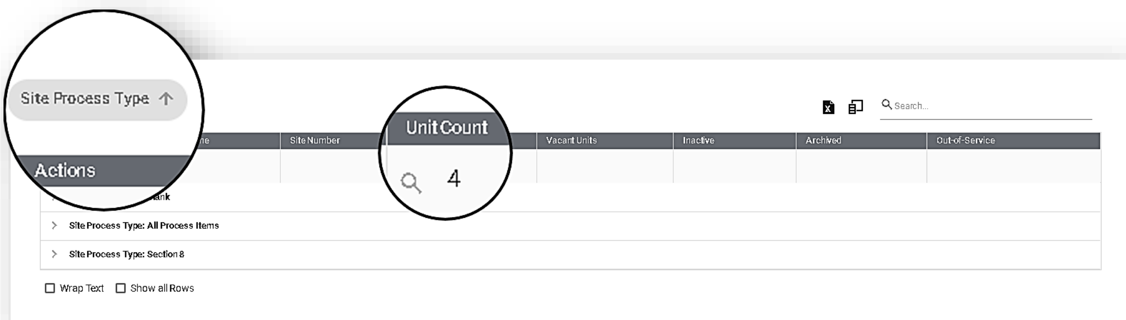


The *Funnel* is also used to filter information in individual columns of the grid. Select an option in the menu to view specific results or view all options by selecting *Select All*.

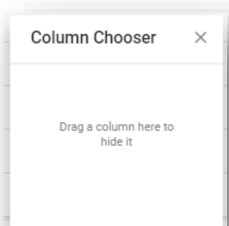



You can group data to customize the presentation of search results. Notice the text directing you to drag a column header to that area for grouping on the left side of the grid. Drag and drop a column to this area. In this example, the drag and drop function is illustrated with the *Site Process Type* column.

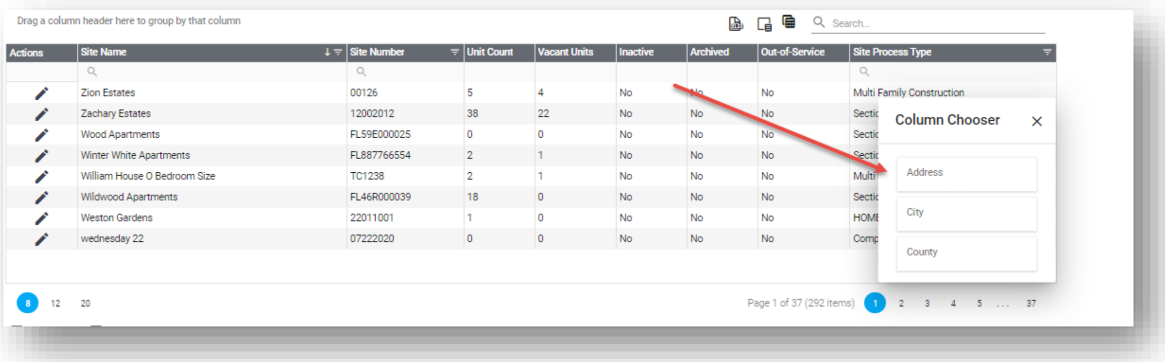
Notice several things; the column header is now displayed outside the grid, and the pre-selected filters are applied simultaneously. Click to view the row details.



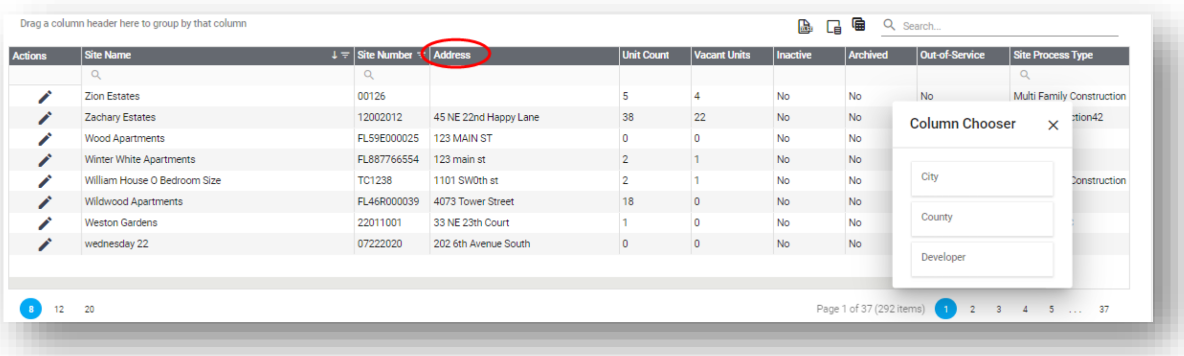

The *Column Chooser* is used to hide unwanted columns in the grid. To use this function, click on the *Column Chooser* on the right side of the grid.



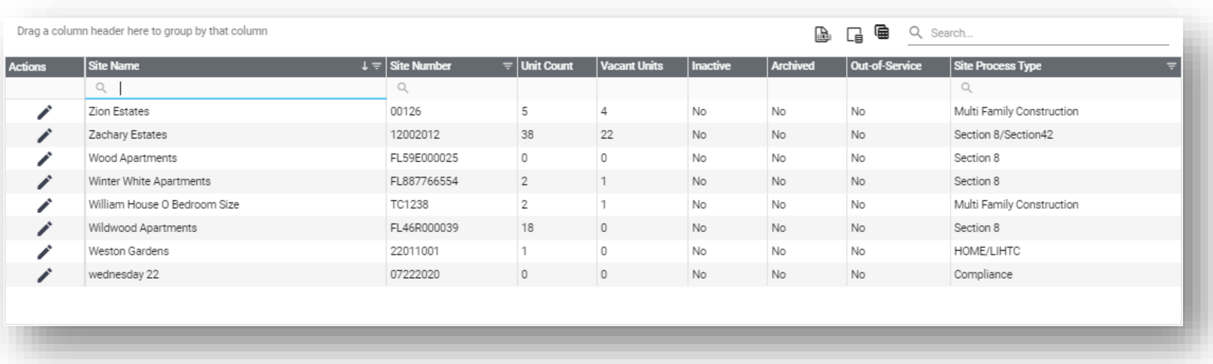
Drag and drop the column into the *Column Chooser*. Once you remove a column, it will no longer be visible until it is placed back into the grid.



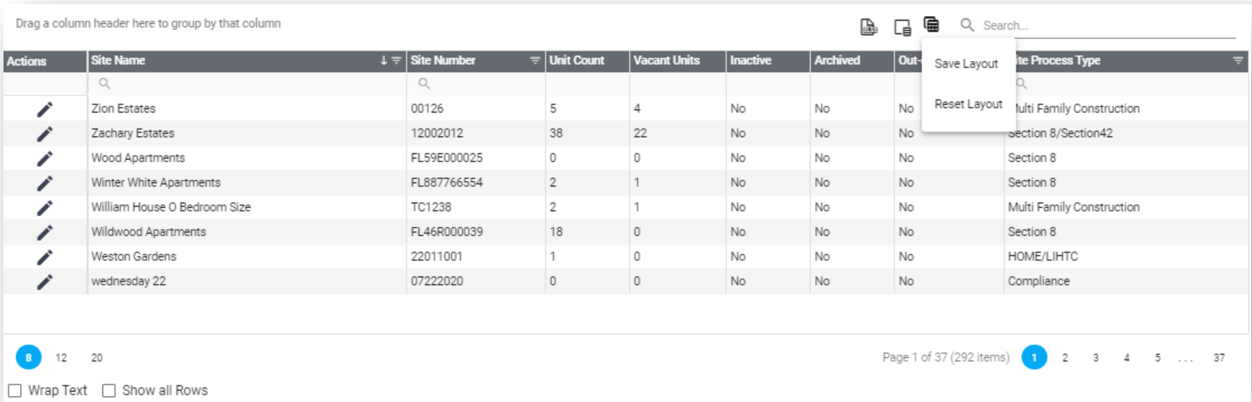

The Column will be added to search grid and will be removed from the *Column Chooser.*



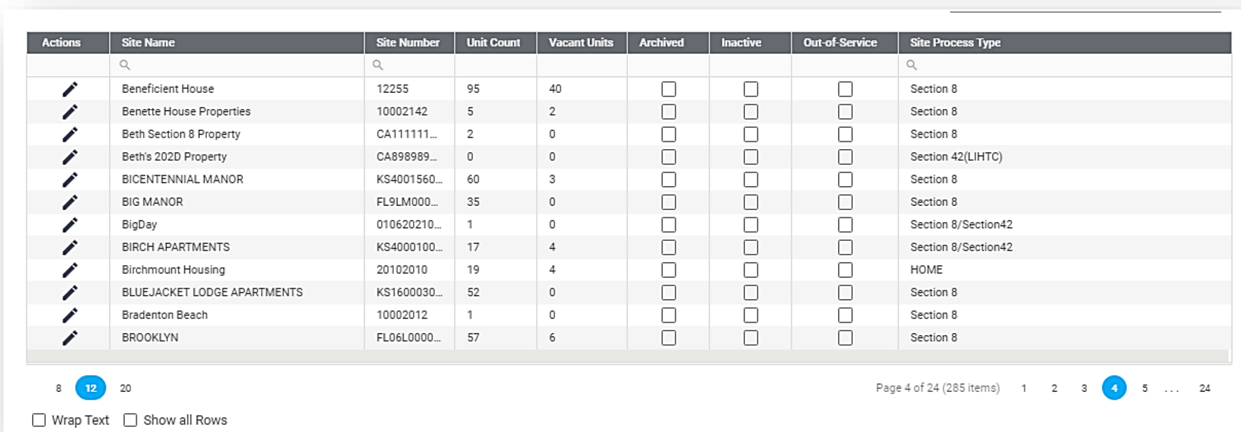

To export data, click *Export All Data* located on the right side of the grid. The grid contents will be exported into Excel and will inherit the data presentation of the grid.




Create a user defined view by selecting and organizing the column headings on the search grids. To save the user defined view click the *Waffle* icon, then click *Save Layout*. The view will be associated with your user profile. To reset the column order to the HDS default layout click the Waffle icon, then click Reset Layout. A message will be displayed "Revert back to the HDS default layout?" Click "Yes" to reset column order.




*Wrap Text* is used for automatic row height adjustment and *Show all Rows* is used to view all rows in the grid. Select the number of records per page you wish to view on the bottom-left side of the grid. Page selection and the number of records in the grid is on the bottom right-hand side.



## Navigation Tabs

*Navigational Tabs* are located on the right-hand side of each record. This allows for easy navigation to various areas of the system without using the search functionality.

| Navigation Tabs | Description |
|---|---|
|   | Displays the list of Units associated to the Buildings. The Units tab displays **General**, **LIHTC** and **TRACS** Unit numbers. Selecting an option in the table will redirect you to the **Unit > General Information** area. |
|   | Displays a list of Tenant Certifications for all Tenant members which resided in the unit. To view certification details, click on a Tenant Certification. |
|   | Displays a list of all previous certifications. |

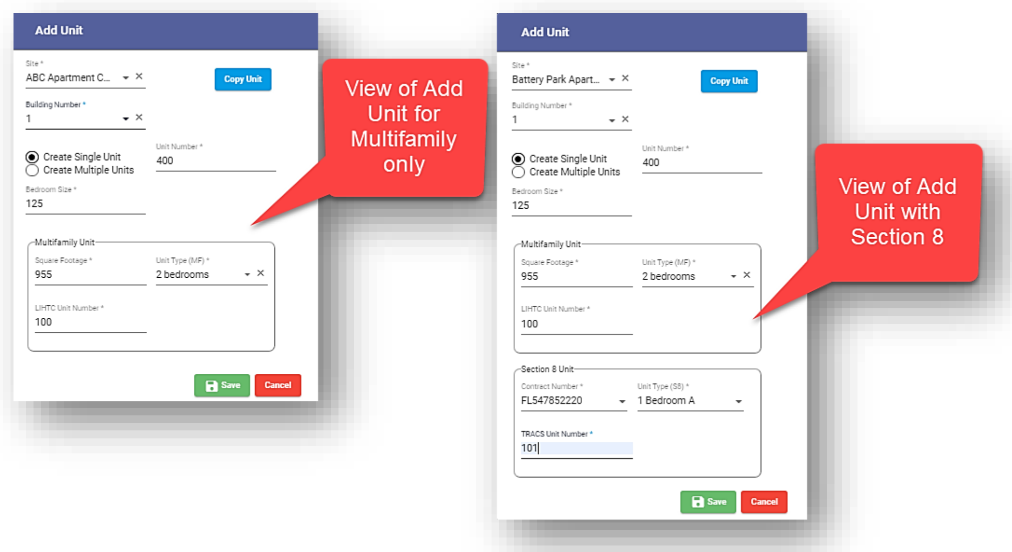
# Property Group

## Add Unit

*Unit* represents the living space which can be occupied by a tenant. This work area is used to manage records that contain unique unit information and characteristics.

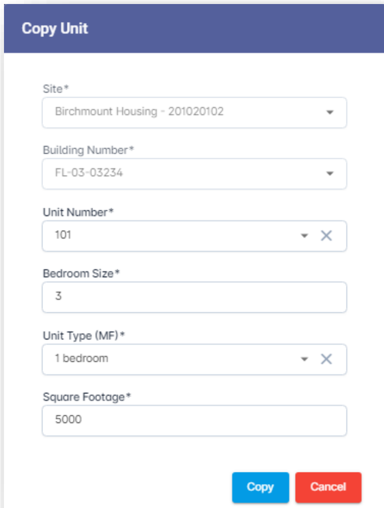
**To add a Unit:**

1. Click *Add Unit* located in the top-right corner of the *Search* area.
2. Select a Site and Building Number combination.
3. Choose if you want to create units individually or in batches:
    a. If you wish to create one unit, select *Single*.
    b. To create more than one unit, select *Multiple*. Enter the unit numbers separated by commas.
4. Enter the *Bedroom Size*.
5. Enter *Square Footage, Unit Type (MF)*. You must enter *LIHTC Unit Number* in the *Multifamily Unit* section if you are creating one single unit. If the Site you have selected has units with Section 8, you must select *Contract Number* and *Unit Type* and enter the *TRACS Unit Number*.

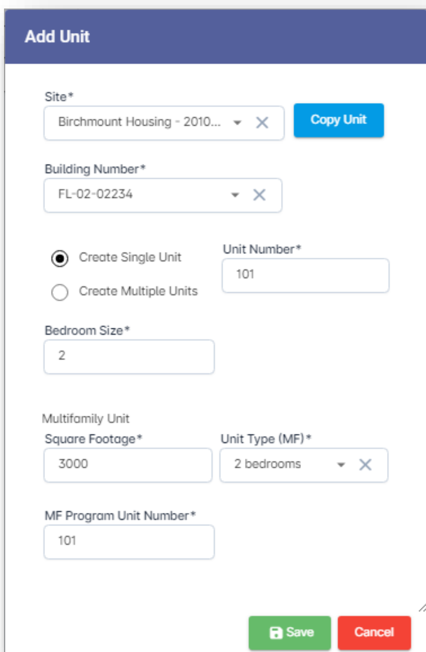



## Copy Unit

1. Select a *Site* a *Building* combination.
2. To copy unit records and use them in an existing or new building, Click *Copy Unit*.
3. Select a *Unit Number, Bedroom Size, Unit Type*, and the *Square Footage*.




4. Click *Copy* to complete your actions.



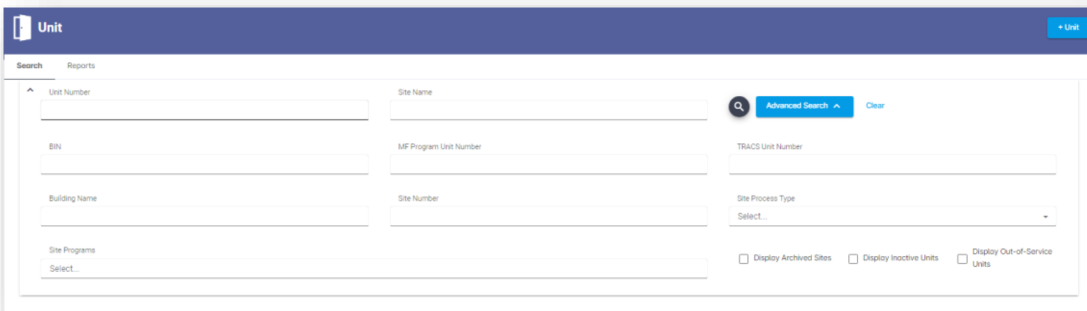

5. Choose if you want to create units individually or create multiple units:
    a. If you wish to create one unit, select *Single.*
    b. To create more than one unit, select *Multiple.* Enter the unit numbers separated by commas.
6. Click *Save* to complete your actions.

## Unit Search

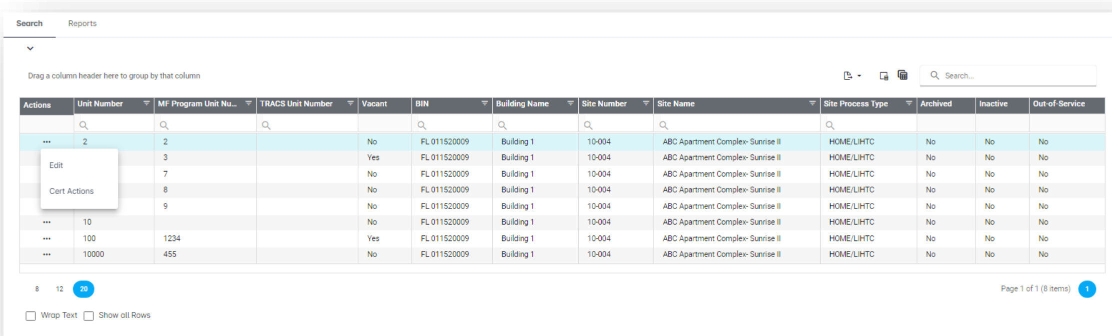
Upon access to the Unit work area, you will see the *Search* section. To begin your task, use the search to locate a Unit record.

To search for a Unit:

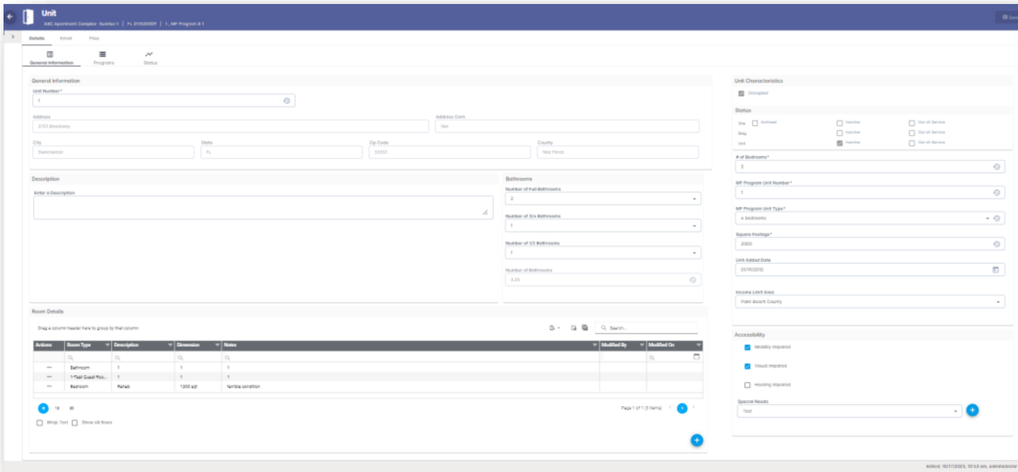
1. Enter the search criteria for Unit.
   a. Enter the Unit Number and click Search. The system will display unit records for all assigned Sites.
   b. Enter the Site Name and click Search. The system will display unit records for all assigned Sites.
   c. To view additional search options such as *BIN, LIHTC Unit Number, TRACS Unit Number, Building Name, Site Number, Site Process Type, Site Process Items,* click *Advanced Search.*




From the Unit search grid users can access unit details by double clicking on a desired row




or clicking *Edit* in the *Actions* column.



Also, from the *Actions* column users can create *New* or *Modify* an existing clicking *Cert Actions.*

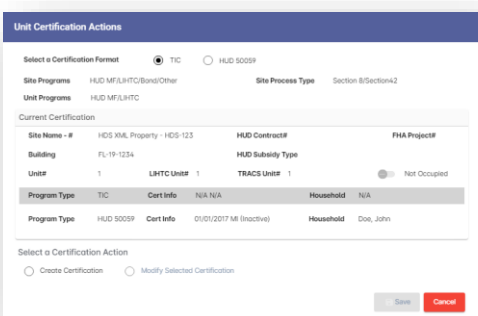
**IMPORTANT NOTE**

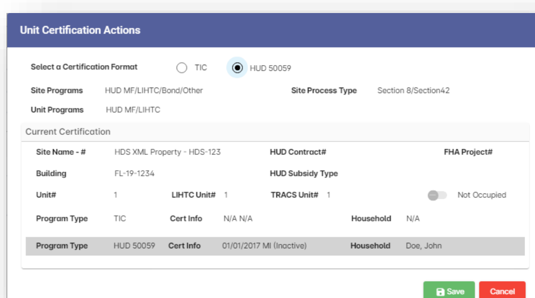
From the Unit area users can create tenant certifications from the *Search Grid* or by clicking *Cert Actions* on the *Unit Details* screen.

# Creating Certifications from the Unit Area

## Certification Actions

The Certification Actions box displays information about the certification and the programs applied at the site, unit, and tenant level (when applicable). There are two options that can be displayed for the Certification Format: TIC and HUD 50059. *TIC* is displayed for all programs except HUD MF (Section 8*). TIC* and *HUD 50059* are displayed if the tenant in the unit meets the criteria for both programs. Click *TIC* or *HUD 50059* to view certifications details.



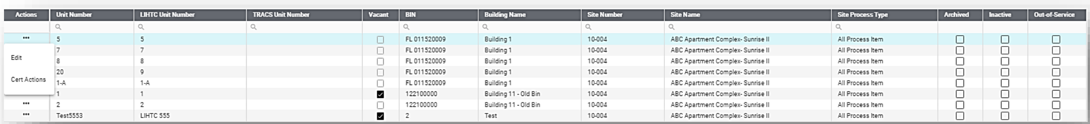
> **IMPORTANT NOTE**
> The system allows users to create *LIHTC/HOME* and *Section 8* certifications for the same tenant member. LIHTC certifications can be manually created from the *Unit* area or uploaded via *XML*.

Each certification that is currently applied to the unit will be displayed in the *Current Certification* section. More than one cert can be present at a time.  The unit's status, occupied or vacant, is shown above. The available certification options are displayed when you click *Create Certification*. The certification options for a unit are based on the tenant's last certification. Certifications must be "*Submitted*" to enable the certification options; *Income Certification (IC), Unit Transfer (UT), Annual Recertification (AR),* and *Move-Out (MO).*

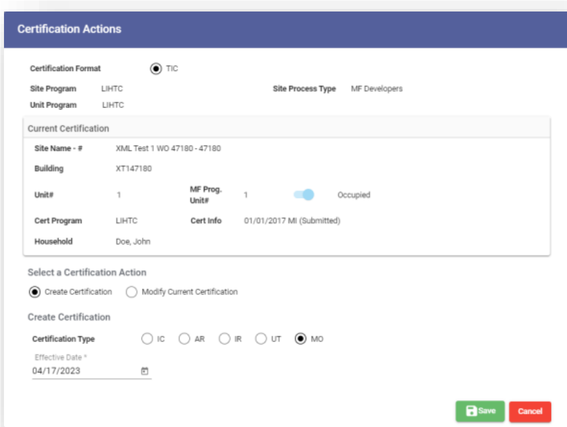
## Creating Tenant Certifications

**To create a new certification:**

1. Select *Cert Actions* in the *Actions* column of the record.



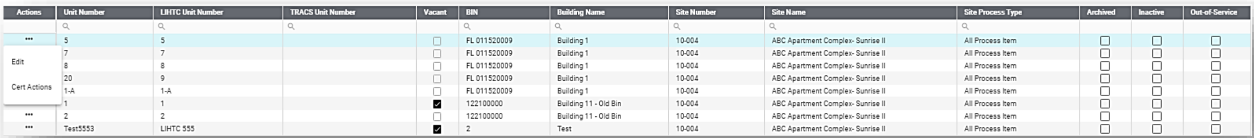
2. Select a *Certification Type* and *Effective Date*.  If you select a *UT*, you must select the unit the certification will be transferred to.



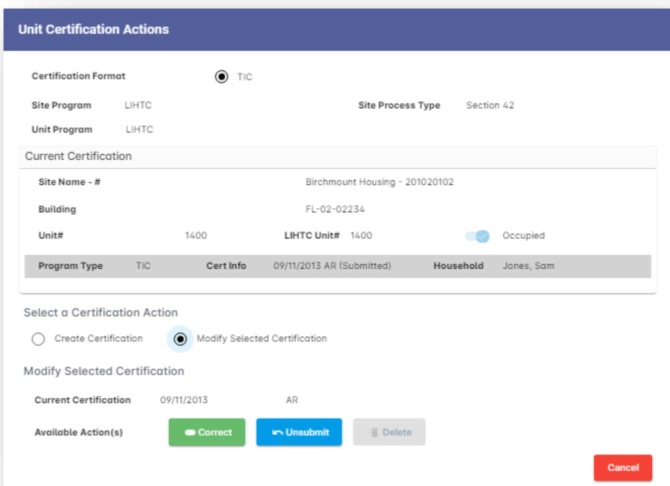

3. Click *Save* to complete your actions.

**To make corrections to a certification (LIHTC/HOME):**

1. Select *Cert Actions* from the *Actions* column of selected the record.



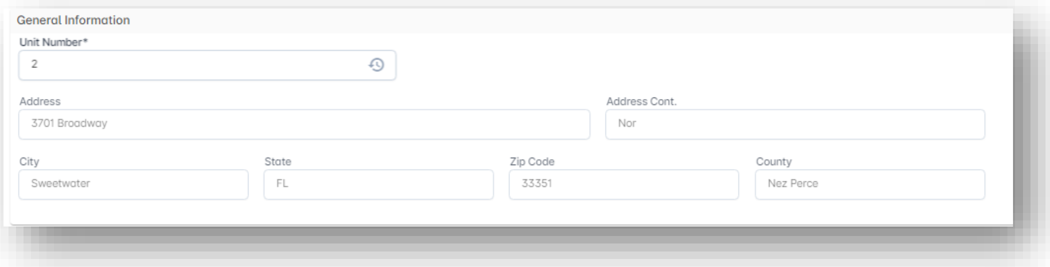

2. Select *Modify Selected Certification*.
3. Click one of the following actions:
   a. **Correct** – An unsubmitted copy of the tenant certification will open. The previous version of the certification can be accessed from the Priors side tab.
   b. **Unsubmit/Submit**– To update the most recent certification click *Unsubmit*. A validation message will appear click *Yes* to proceed. The certification can now be updated. Once the certification has been updated click *Submit*.
   c. **Delete** – The certification will be removed.
4. Click *Save* to complete your actions.



# Unit

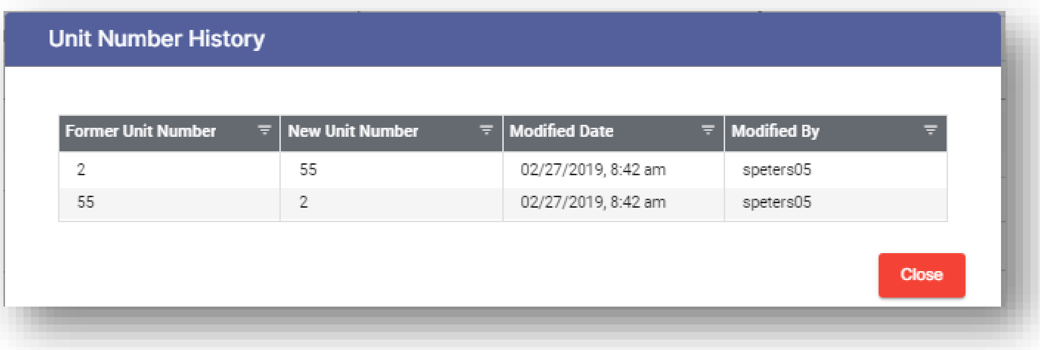
## General Information

In this area users can assign a unique number to identify a Unit and address within a building.



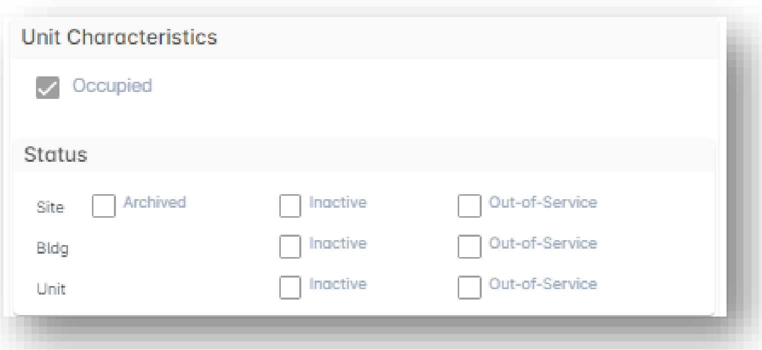

## Unit Number History

Click the icon, to the left of the unit number will populate the *Unit Number History* log. This section tracks the *Former Unit Number, New Unit Number, Timestamp* and *User.* After verifying the information, click *Close* to exit.



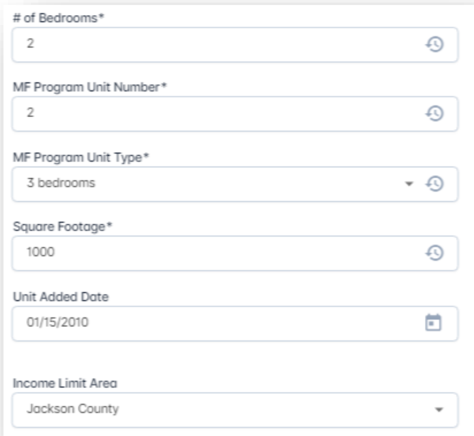

## Unit Characteristics

This section displays the status of the Unit.




**Occupied** – If this box is checked, the unit is occupied by a tenant.

**Status** - The current operating state of a Site, Building, or Unit.

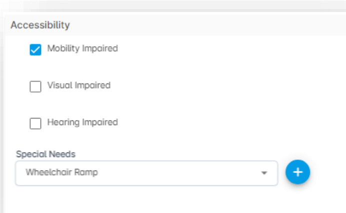



**# of Bedrooms*-** Represents the number of bedrooms in a unit.
**MF Program Unit Type-** Represents the type of unit. Choose a Unit Type from the drop down menu.
**Square Footage-** Represents the total square footage of the unit.
**Unit Added Date-** Represents the date the unit was added.
**Income Limit Area-** The income limit area is inherited from the site. If the unit does not reside in the area listed in the income limit area, select the area from the drop down menu.

| IMPORTANT NOTE |
| --- |
| Click the icon to the right of # of Bedrooms*-, MF Program Unit Type, and Square Footage to view History details. |

## Accessibility

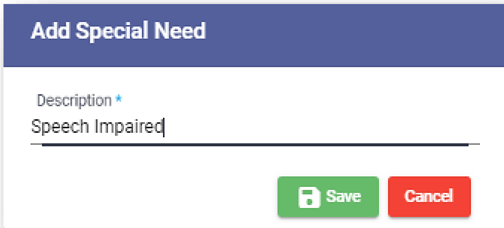
Use this section to describe the *Special Needs* accommodation made to the Unit. Select the option that applies.




## Special Needs

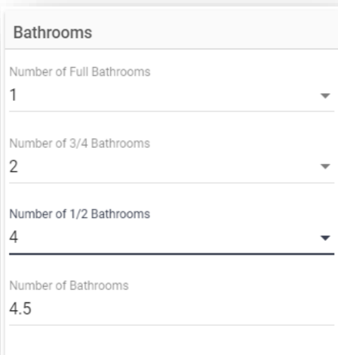
To add a new Special Needs description:

1. Click Add Special Needs ( Need WO to update Spelling)
2. Enter a description from the *Add Special Needs* box.
3. Click *Save* to complete your actions.




## Bathrooms

This area tracks the number of bathrooms in a unit. Select a value from *Number of Full Bathrooms, Number of ¾ Bathrooms*, and *Number of ½ Bathrooms* drop down. The *Number of Bathrooms* is a calculated value.



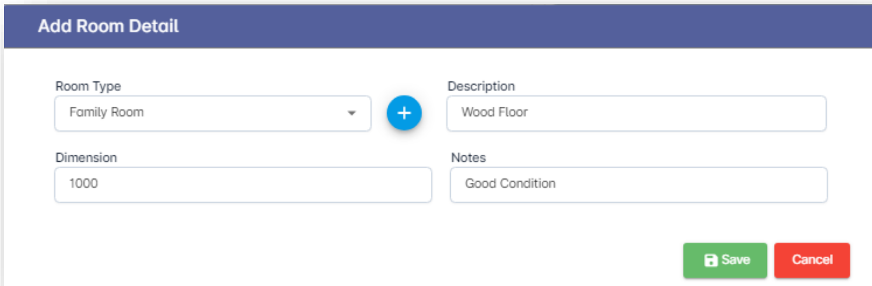

| **IMPORTANT NOTE** |
|---|
| Number of Full Bathrooms + Number of ¾ Bathrooms + Number of ½ Bathrooms = The Number of Bathrooms.<br><br>Click the icon to the right of The Number of Bathrooms to view History details. |

## Room Details

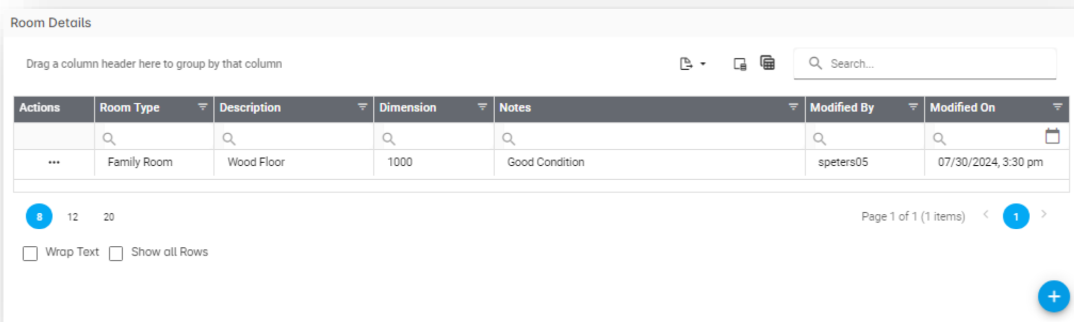
This area tracks the *Type of Room, Room Description, Dimensions*, and any *Notes* related to a Unit.

**To add Room Details:**

1. Click the plus sign in the Room Details area.
2. Select a *Room Type* description from the drop down menu. Enter a *Description, Dimension* and *Notes*.

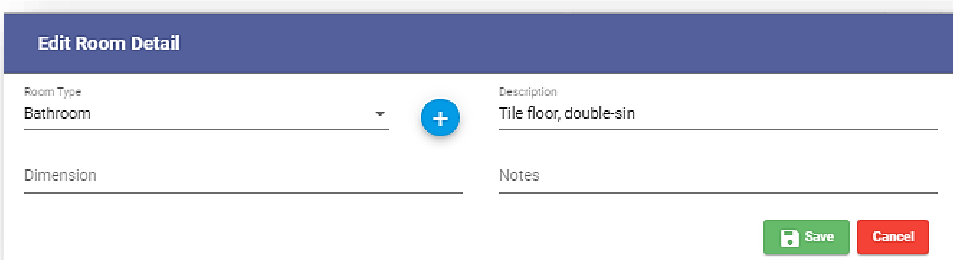



3. Click *Save* to complete your actions.



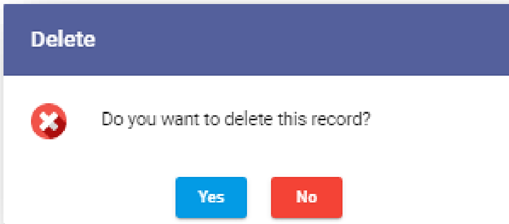

**To Edit Room Details:**

1. Select *Edit* from the Actions column.
2. Update the Room Type *Description, Dimension* and *Notes*.
3. Click *Save* to complete your actions.




**To remove a record:**

1. Select *Delete* from the Actions column to remove a record.
2. Click *Yes* to confirm your actions.

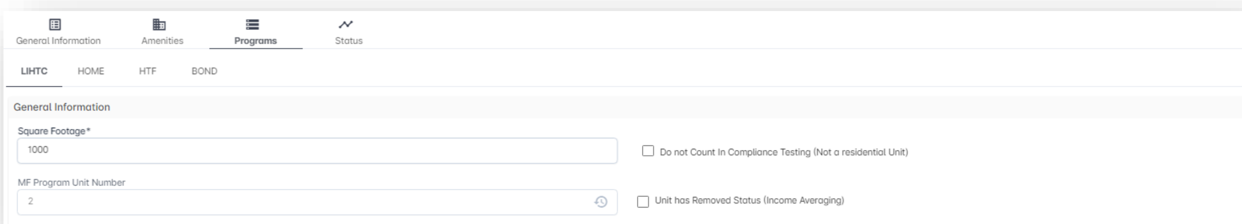



# Programs

This area allows you to manage the allocations, requirements, and other information for each program at a site. A site's program(s) are defined by the agency. Based on the program the system will display a tab used to collect data for the specific program.

## LIHTC

The *LIHTC* area allows users to view the units square footage, MF Program Unit Number, exclude unit from Compliance Testing/Income Averaging and assign Unit Designations that is specific to a unit.




**Square Footage -** This value reflects square footage of the unit. This value defaults to the General Information Unit Number and cannot be edited.

**MF Program Unit Number -** This reflects the Tax Credit Unit Number in use. This value defaults to the General Information Unit Number and can be modified.

**Do not Count in Compliance Testing (Not a residential Unit)-** Check this box if unit is occupied by the manager or is a unit that is not counted as residential per LIHTC rules. If not checked, the unit is residential.
**Unit has Removed Status (Income Averaging) –** Check this box if the *Building Set-Aside* is set to *Average Income.*

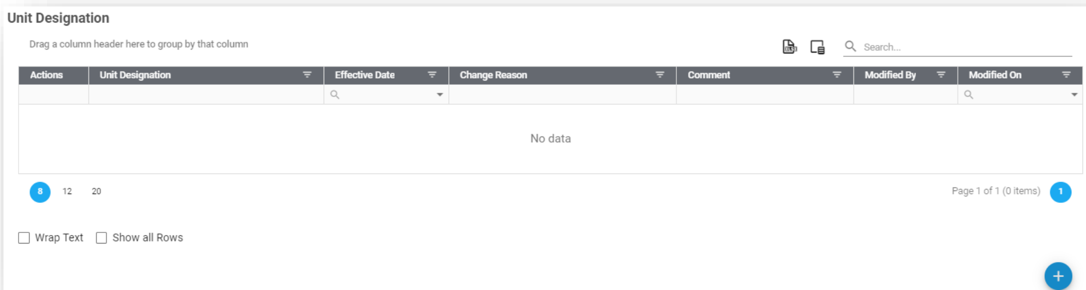
## Average Income Designations

This area allows users to assign a designation to a unit, if building is set to Average Income.

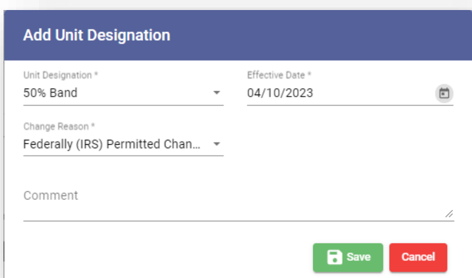
## Unit Designation

**To add a Unit Designation:**

1. Click the plus sign to add a new record.




2. Select a description from the *Unit Designation*, *Change Reasons* drop down menus and select an *Effective Date*. Enter any *Comments* that may apply.

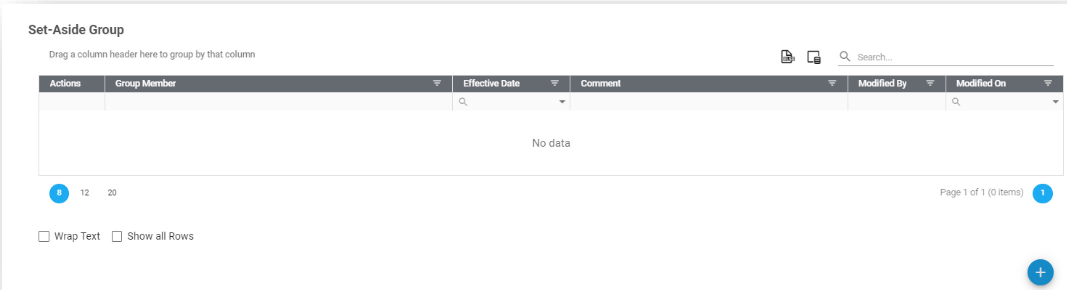



3. Click *Save* to complete your actions.

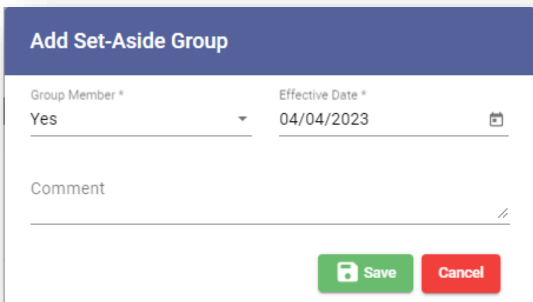
## Set-Aside Group

**To add a Set-Aside Group:**

1. Click the plus sign to add a new record.



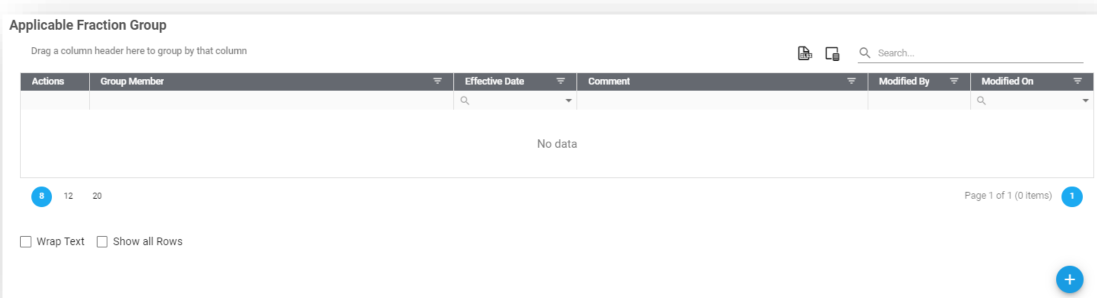

2. Select a *Group Member* from the drop-down menu and select an *Effective Date*. Enter any *Comments* that may apply.




3. Click *Save* to complete your actions.

## Application Fraction Group

1. Click the plus sign to add a new record.

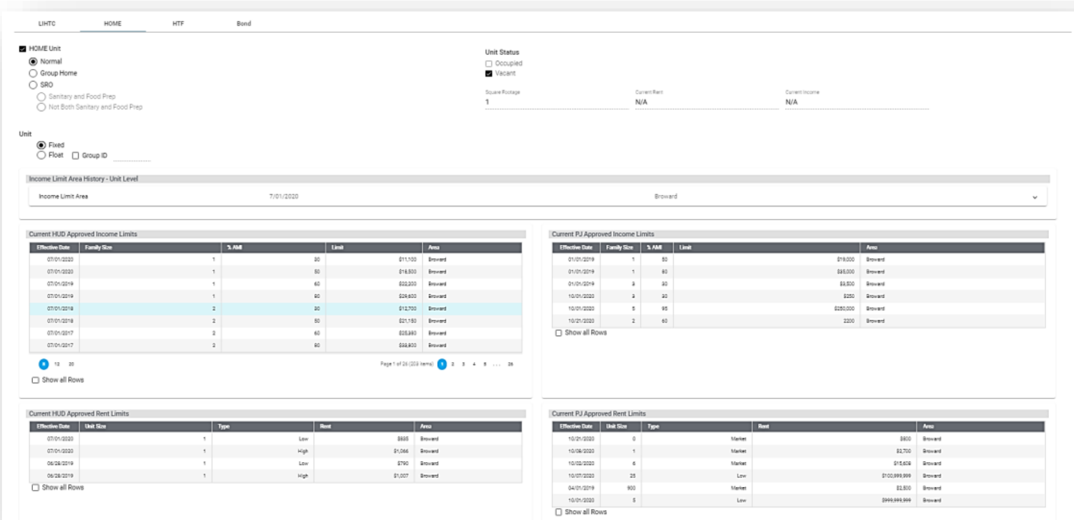



2. Select a *Group Member* from the drop-down menu and select an *Effective Date*. Enter any *Comments* that may apply.


3. Click *Save* to complete your actions.

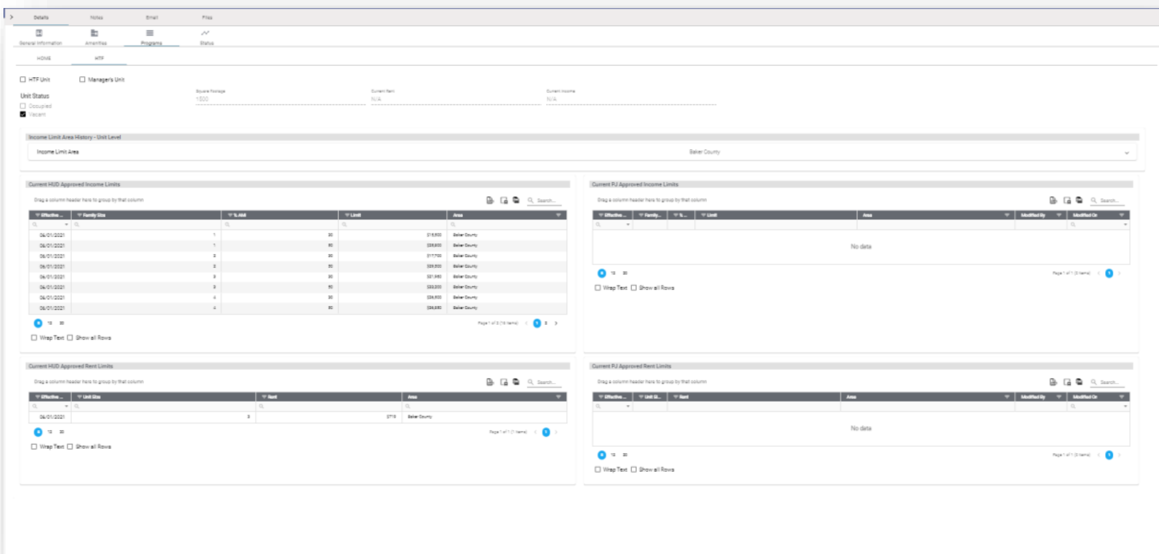
## HOME Program

The *HOME* area allows you to enter data for the HOME program that is specific to a unit. If the income limit data at the unit-level has been given, that information will be displayed here as read-only and the include “Unit Level” in the dropdown label. The Current HUD Approved Income Limits grid shows the approved income limits of the record selected in the Income Limit History grid or dropdown. The Current HUD Approved Rent Limits grids display the approved rents of that same record. The system imports AMIs for income limits at 30%, 50%, 60% and 80%. All other income limit percentages can be manually added For each income limit year, there will be a low and high approved hint classified as a **Type**. The **Effective Date** is the day the program was implemented. The Current PJ Approved Income Limits and Current PJ Approved Rent Limits records must be created manually for each fiscal year. You cannot add an approved income or rent limit that exceeds the HUD value that is effective immediately before or on the same effective date as the one entered for the PJ approved income or rent limit. When the Current PJ Approved Income Limits are updated, the value for Income Limit Area on the Unit>General Info screen is updated. Income Limit Area The current project approved rent limit is required for each fiscal year.



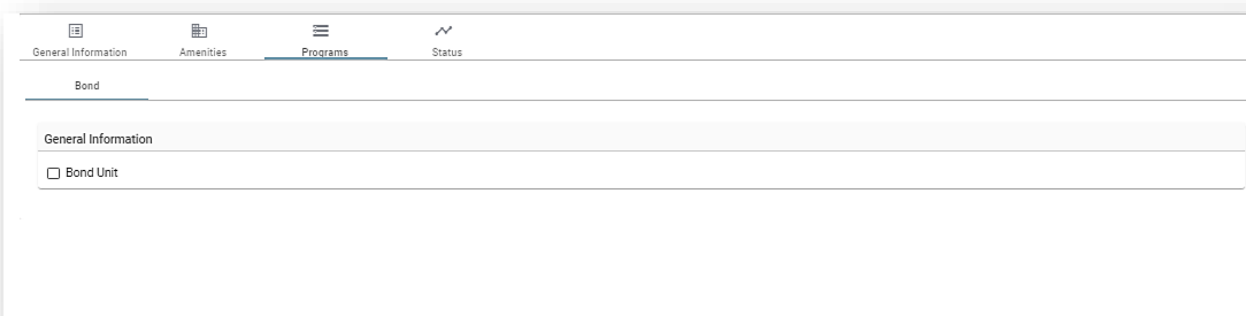
## HTF Program

The *HTF* area allows you to enter data for the Housing Trust Fund program that is specific to a unit. If the income limit data at the unit-level has been given, that information will be displayed here as read-only and include “Unit Level” in the dropdown label. The Current HUD Approved Income Limits grid shows the approved income limits of the record selected in the Income Limit History grid or dropdown. Rent limits reported at 30% and 50% are imported into NextGen. The Current HUD Approved Rent Limits grids display the approved rents of that same record. The Current PJ Approved Income Limits and Current PJ Approved Rent Limits records must be created manually. When the Current PJ Approved Income Limits are updated, the value for Income Limit Area on the Unit>General Info screen is updated



## Bond

Select **Bond Unit** if the bond program is applied.

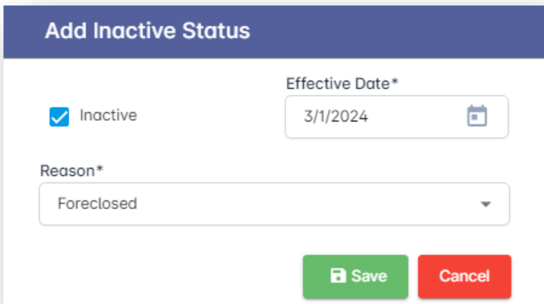


## Status

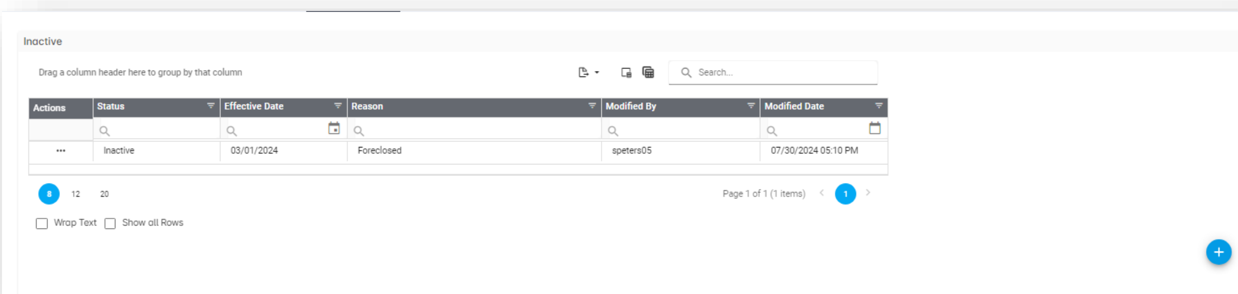
A *Status* declares the current operating state of a Site, Building, or Unit. As a Property Manager you can add a status of *Inactive*, or *Out-of-Service* to a unit. When adding an *Inactive* or *Out-of-Service* record, you must enter a *Reason* to save your changes. The *Effective Date* is the date the status will take effect. You cannot create more than one record of the same status type with the same effective date. If you attempt to create two records with the same effective date, the system will display the message, "*The Effective Date is already used* [current date]", and you will be forced to pick another date.

**To add an Inactive record:**

1. Click the plus sign to add a new record.

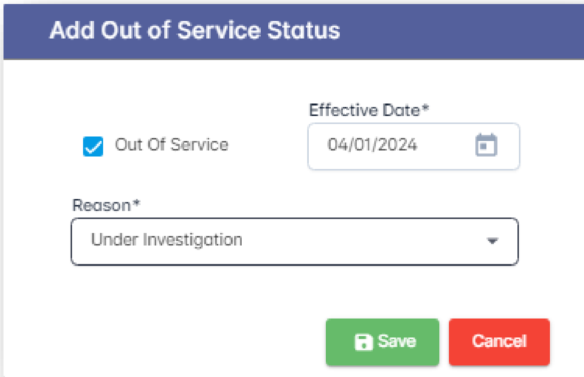



1. Choose an *Effective Date*.
2. Select a *Reason* description.
3. Click *Save* to complete your actions.

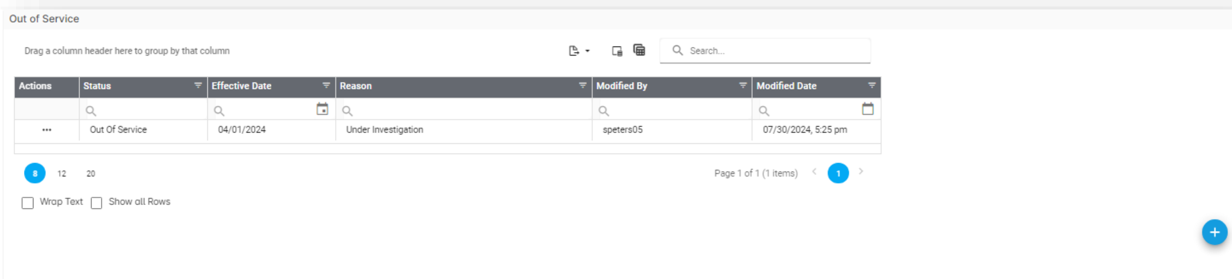



**To add an Out-of-Service record:**

1. Click the plus sign to add a new record.

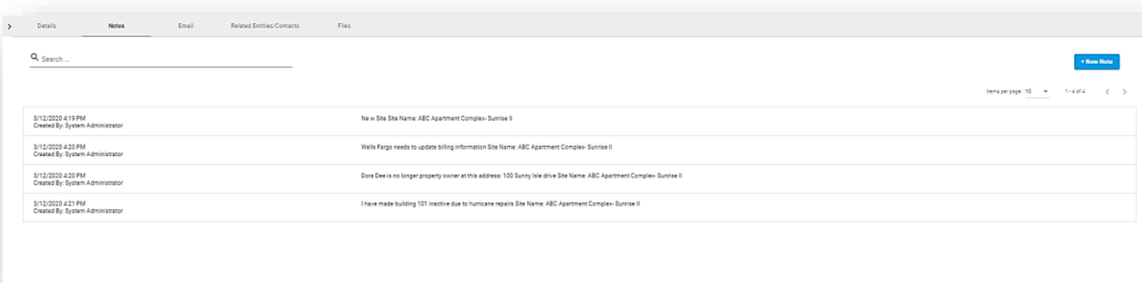



2. Choose an Effective Date.
3. Select *Out of Service* Reason.
4. Click *Save* to complete your actions.



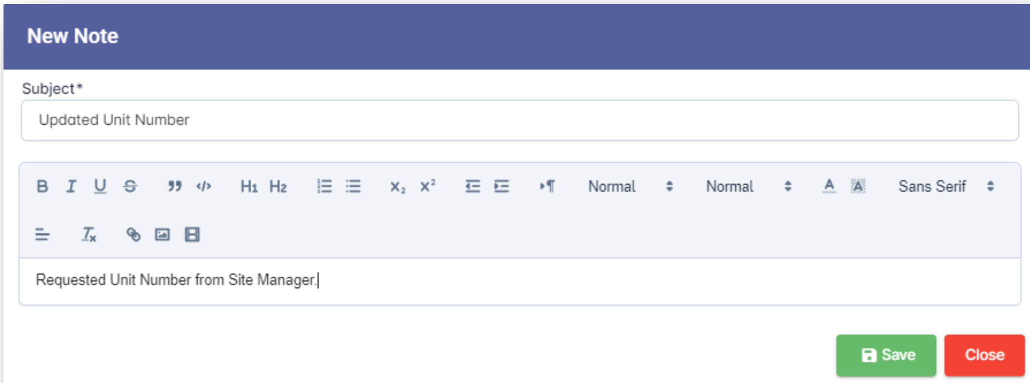

## Notes

*Notes* are used to send messages to internal users about updates, incidents, and important information that should be shared. You can only access notes in the Site, Building, Unit or Tenant record in which message originated. Use the search to find a specific note or view each page by using the navigation buttons on the right-side of the thread. Use the *Sort Notes* buttons to list the notes in *Ascending* or *Descending* order by date.



**To add a Note:**

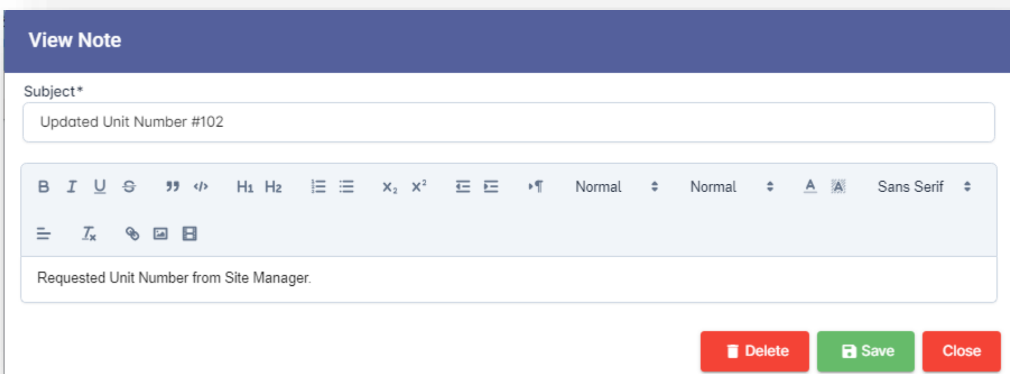
1. Click *Add Note*
2. Enter your message in the *New Note* screen**.** If you wish to convert the email to a note, select *Send as Email*.




3. Click *Save* to complete your actions.

**To update a Note:**

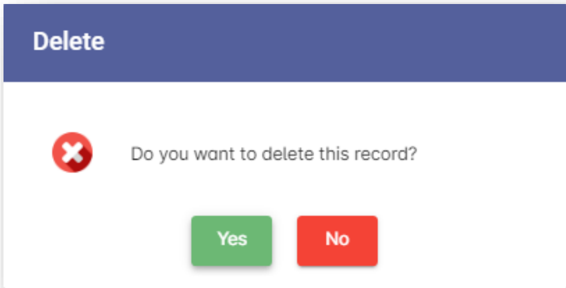
1. Select the *Note* you wish to delete.
2. Update the message.




3. Click *Save* to complete your actions.

**To remove a Note:**

1. Select the *Note* you wish to edit.
2. Click *Delete.*
3. Click *Yes* to confirm your actions.

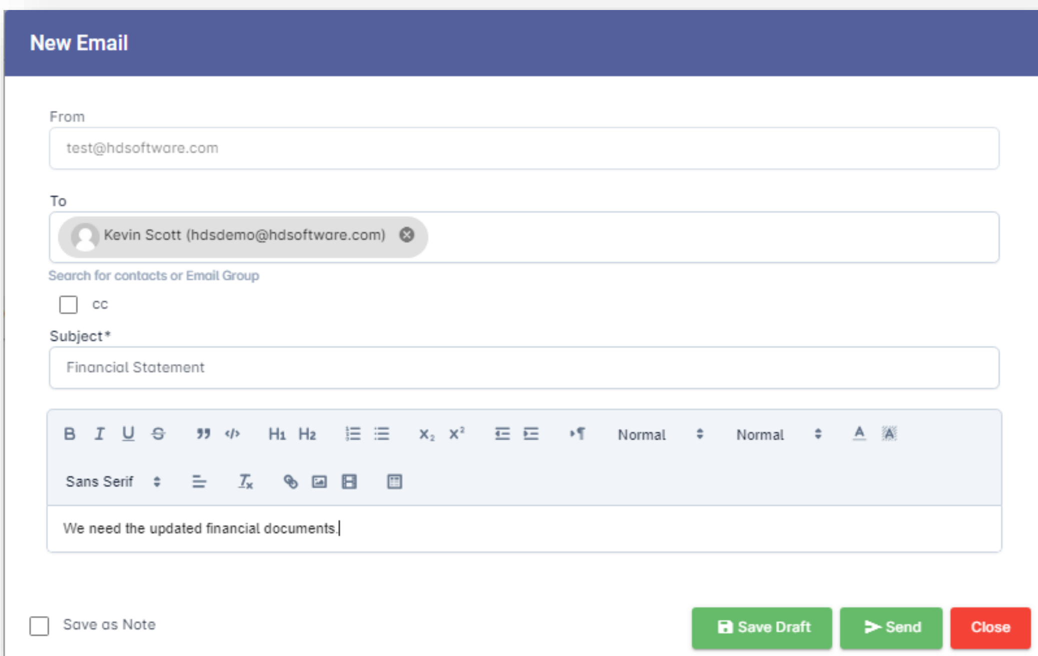



## Email

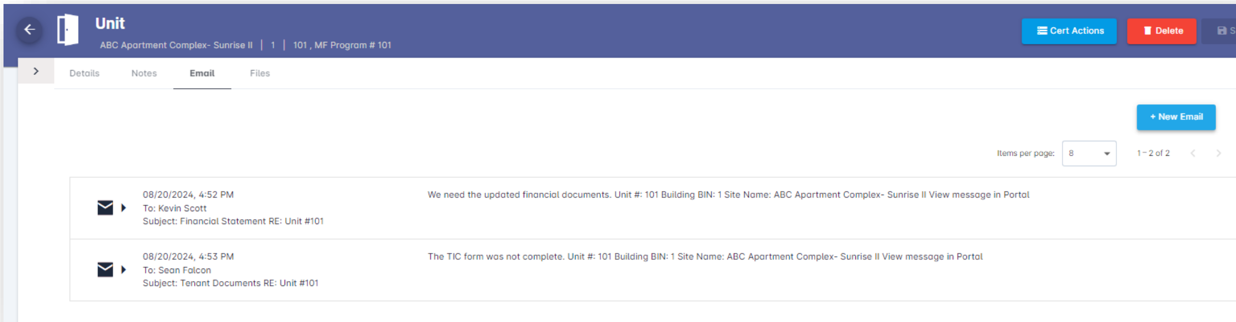
*Email* is used to communicate information to internal and external users. This feature is offered at the Unit and Tenant levels. The contacts list is linked to the email feature so you can select an email address for outgoing messages. You can only access your email messages in the Unit or Tenant record in which the message originated. Use the quick search to find a specific email or view each page by using the navigation buttons on the right-side of the thread.

**To create an Email:**

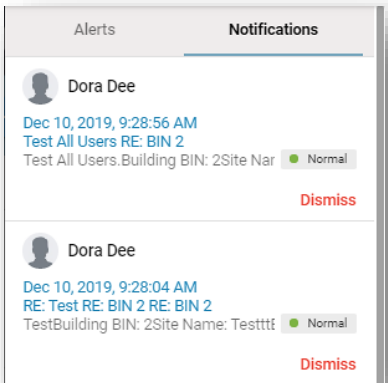
1. Click *New Email*.
2. Begin typing the recipient's name and select the correct contact when it is displayed.




3. To save a copy of an email prior to sending click *Save Draft*, the saved email will be labeled as a Draft. When you've completed your actions. Click *Send.* If you wish to send the message as an email and a note, select *Send as Note.*




After a(n) email or note is sent, a notification will appear in under *Notifications* on the homepage.



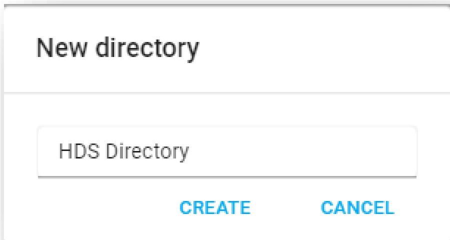

# Files

Documents and images related to a Unit or Tenant record are found in the *Files* area. You can upload a file, view the details of the uploaded file, view versions of the file open and delete your files from the Actions column in the grid. The system accepts all file formats. Each line item displays the File Name, File Type, Size, Upload Date and Timestamp. The Maximum file accepted is 50MB.

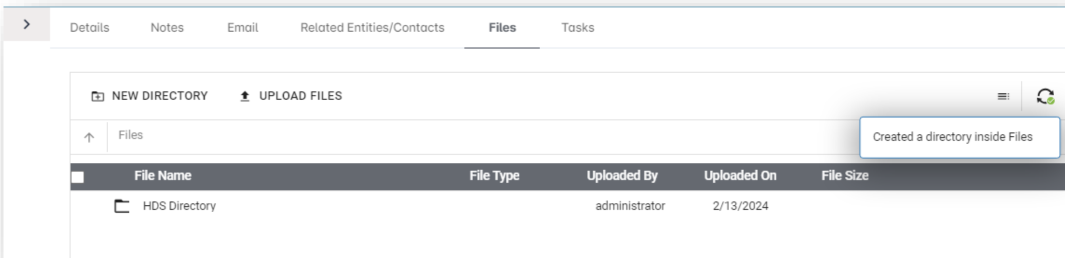
**Creating File Directory**

The system allows users to create File Directories to manage documents.

1. Click on *New Directory.*

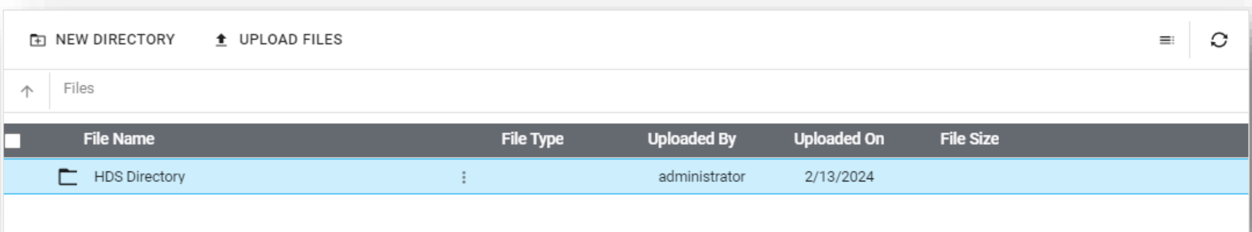



2. Enter the name of the directory and click create.

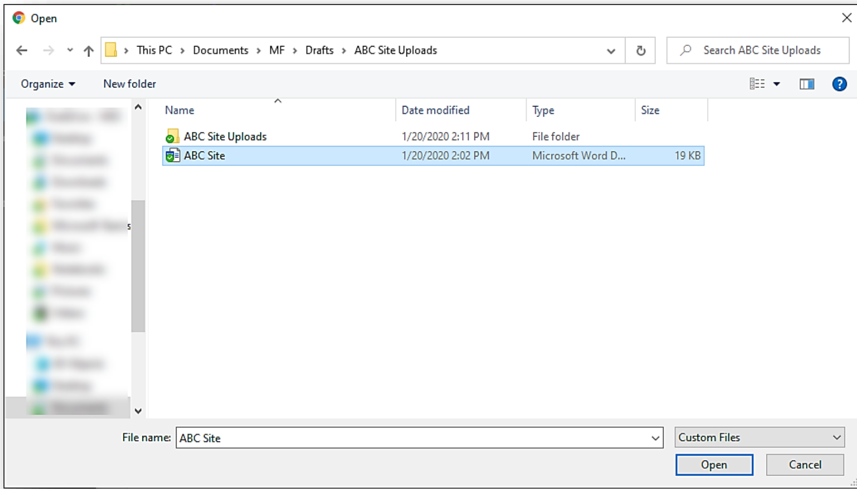



### Adding a File to a Directory

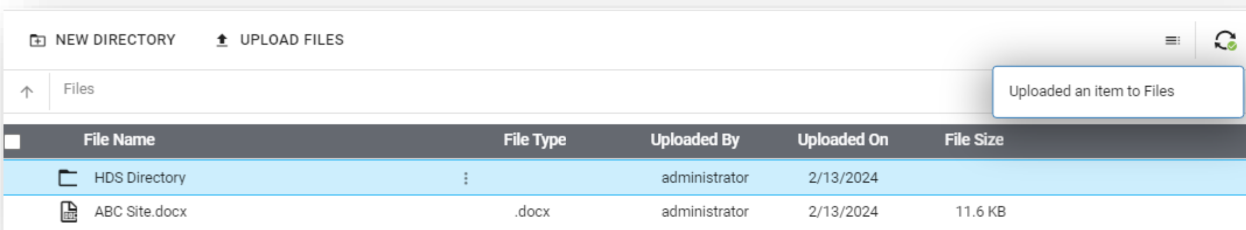
1. Click on *Upload Files.*




*2.* Choose the file you wish to upload from your directory. The system will display the *File Name, File Type, Uploaded By, Uploaded By,*and *File Size.*

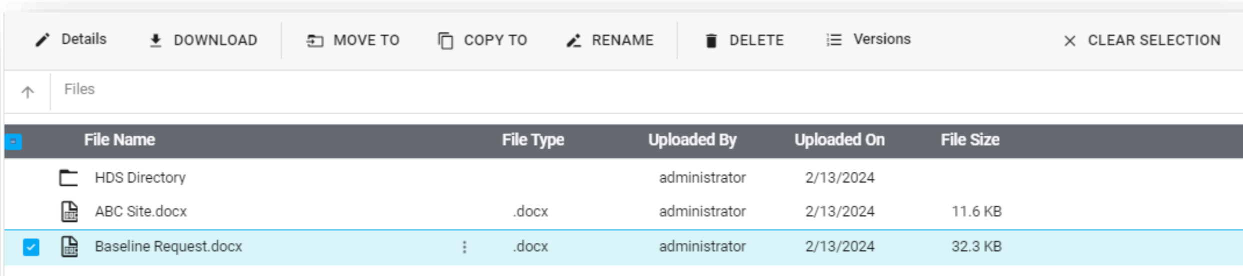



3. Click *Open*.

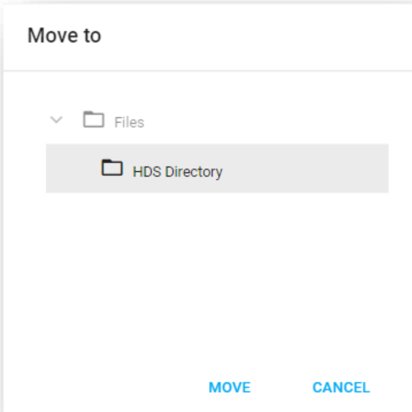



## Add Existing File to Directory

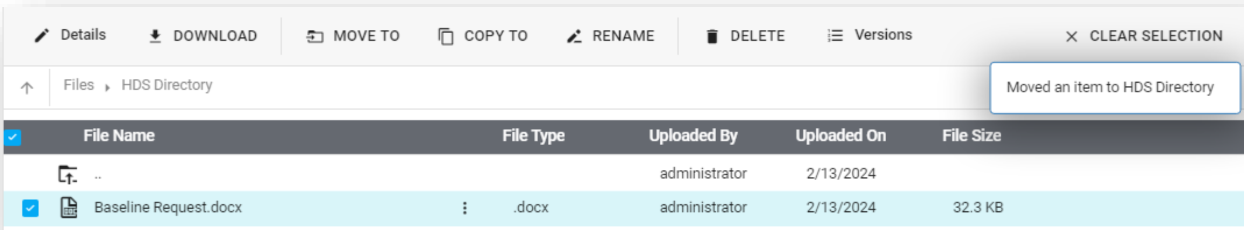
1. Click *Move TO.*




2. Highlight the document.

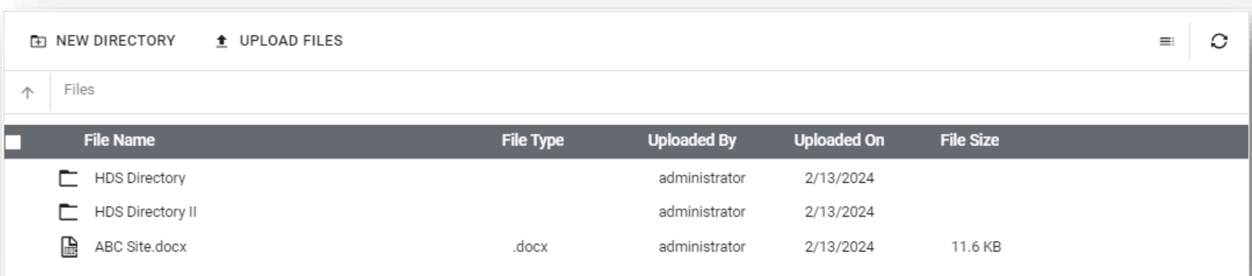



3. Select the *Directory.*
4. Then click *Move. The system will display a message Moved an Item to (Name Of Directory).*

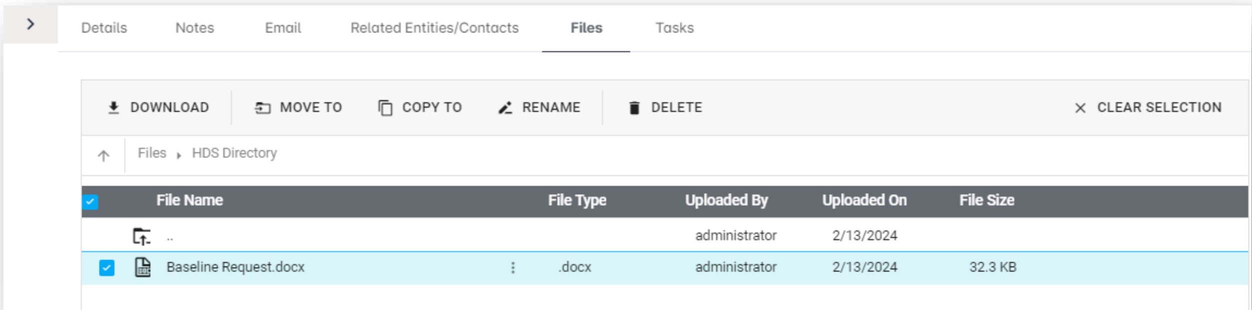



### Copy File to New Directory

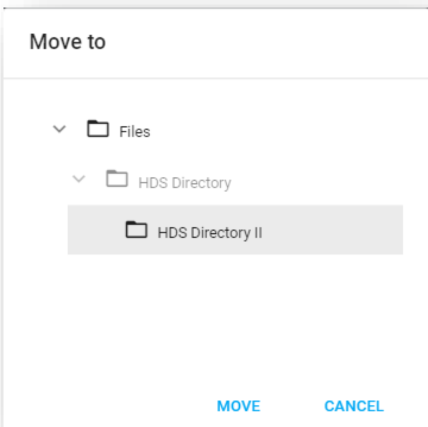
1. Select the *Directory* or *File*.



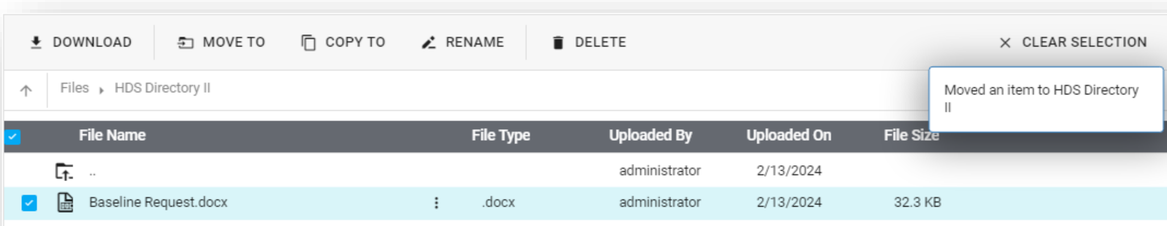

2. Highlight the file.




3. Then click on *Move To*.

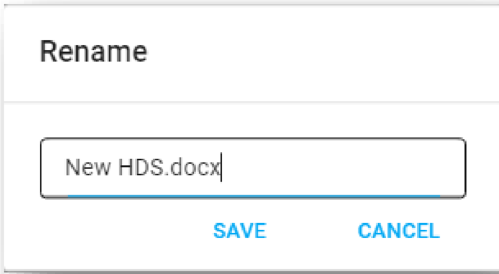



4. Select the *Directory*.
5. Then click *Move*. The document will be moved to the selected directory.




## Update File Name

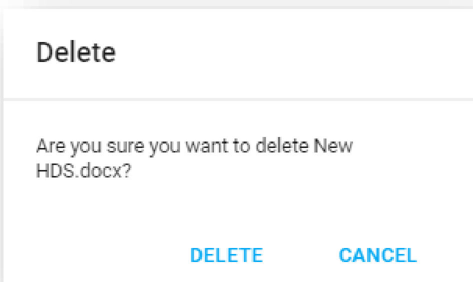
1. Highlight the file and click *Rename.*




2. Enter the new document name and include file extension.
3. Then click *Save*.

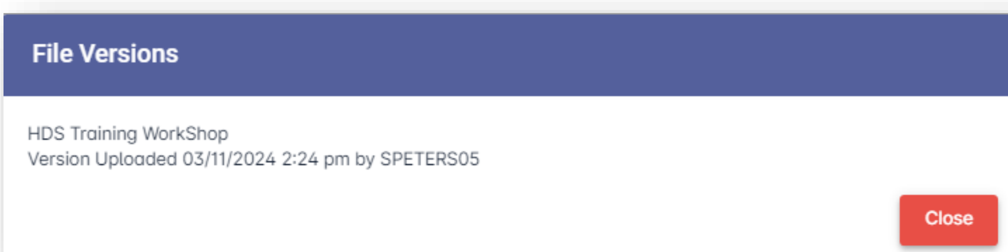
**To remove the File:**

1. Click *Delete* from the Files menu. A message “Are you sure you want to “XXXX” message will be displayed.
2. Click *Delete* to remove file.




**To view Details of a File:**

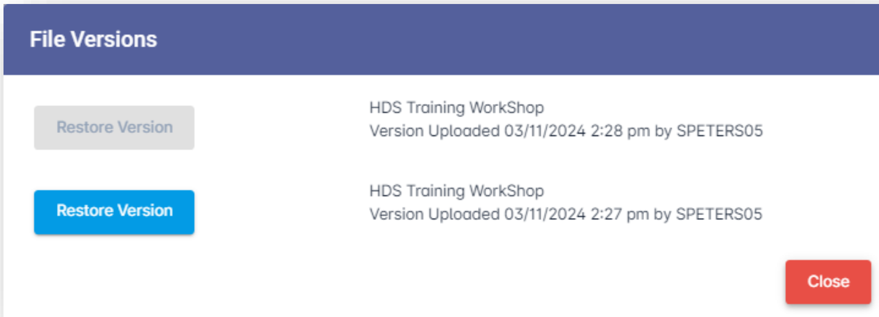
1. Click on *Versions.*
2. View the *File Details*.



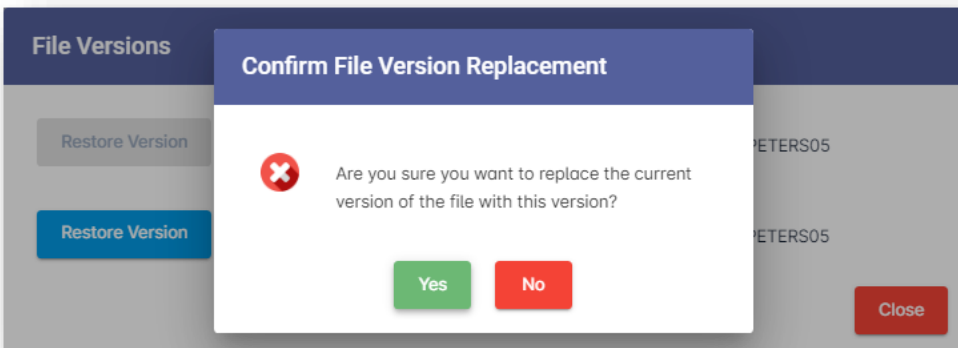

**Updating File Version:**

1. Highlight the document.
2. Click on three dots.

3. Click on *Versions*.

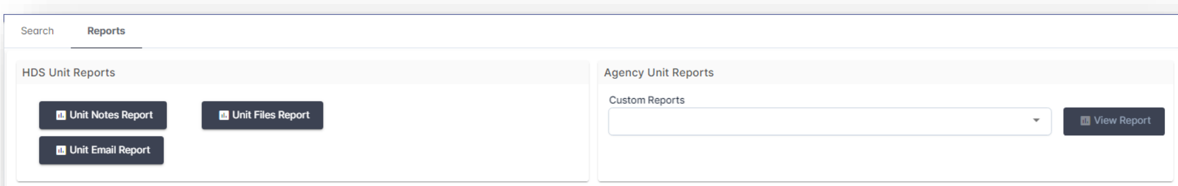



4. Click the *Restore Version* button.
5. From the *Confirm File Version Replacement* box click "Yes" to replace the current version of the file.



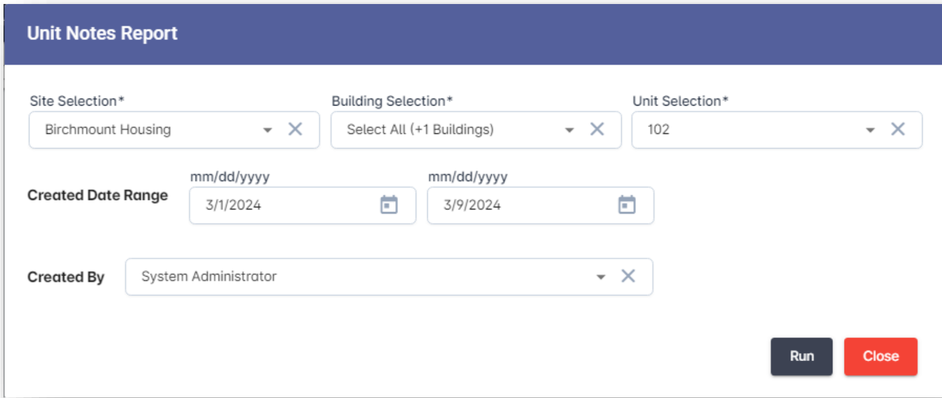

## Reports

This area allows you to generate *Unit Reports, Unit Notes, Unit Email* and *Agency Site Reports*.

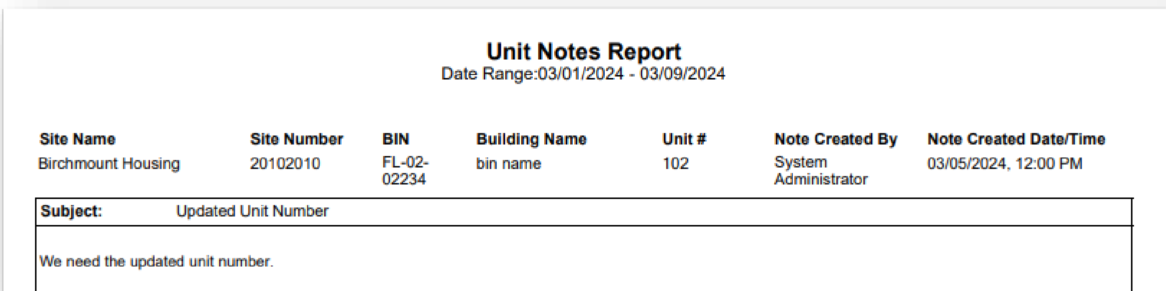



**Units Notes Report**

1. Click on *Unit Notes Report*.




1. Select the *Site, Building, Date Range,* and *System User*.
2. Then click *Run*.



**Unit Notes Report**
Date Range:03/01/2024 - 03/09/2024

| Site Name | Site Number | BIN | Building Name | Unit # | Note Created By | Note Created Date/Time |
|---|---|---|---|---|---|---|
| Birchmount Housing | 20102010 | FL-02-02234 | bin name | 102 | System Administrator | 03/05/2024, 12:00 PM |

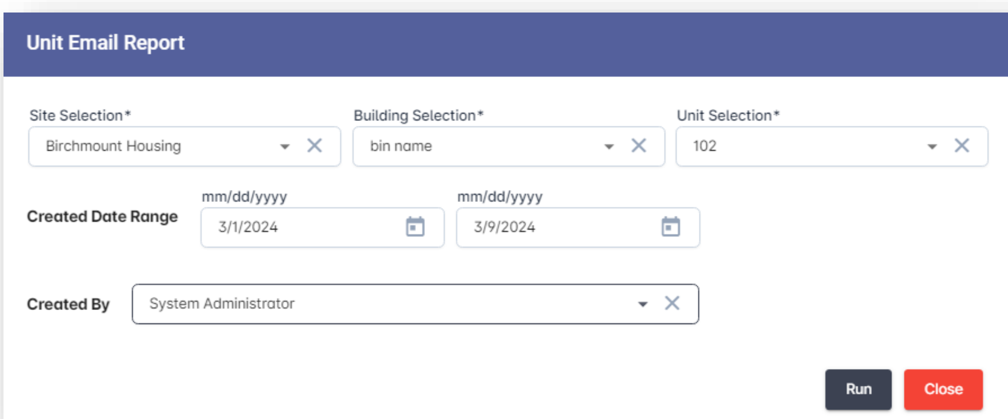
**Subject:** Updated Unit Number

We need the updated unit number.

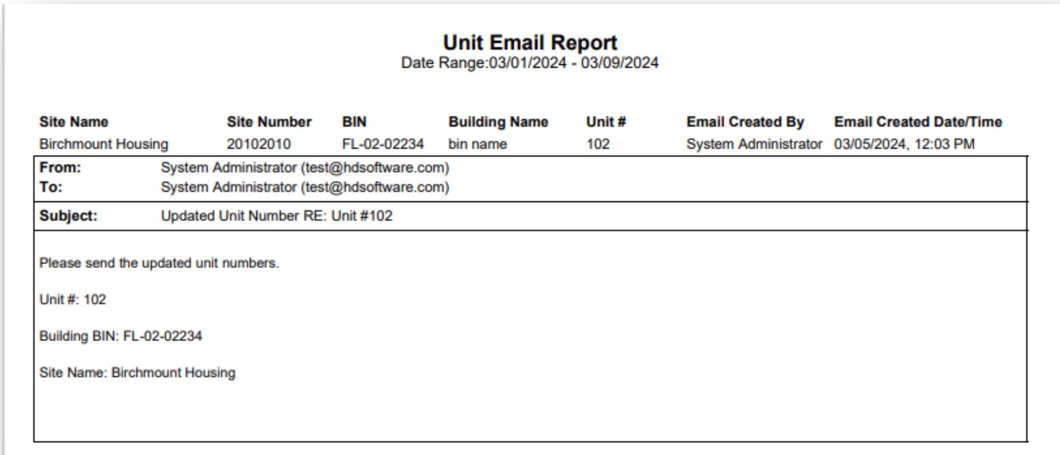
The report displays the Site Name, Site Number, BIN, Building Name, Unit Number, Created By, and Time Stamp.

**Units Email Report**

1. Click on *Email Report*.



2. Select the *Site, Building, Date Range*, and *System User*.
3. Then click *Run.*



**Unit Email Report**
Date Range:03/01/2024 - 03/09/2024

| Site Name | Site Number | BIN | Building Name | Unit # | Email Created By | Email Created Date/Time |
|---|---|---|---|---|---|---|
| Birchmount Housing | 20102010 | FL-02-02234 | bin name | 102 | System Administrator | 03/05/2024, 12:03 PM |

**From:** System Administrator (test@hdsoftware.com)
**To:** System Administrator (test@hdsoftware.com)
**Subject:** Updated Unit Number RE: Unit #102

Please send the updated unit numbers.

Unit #: 102

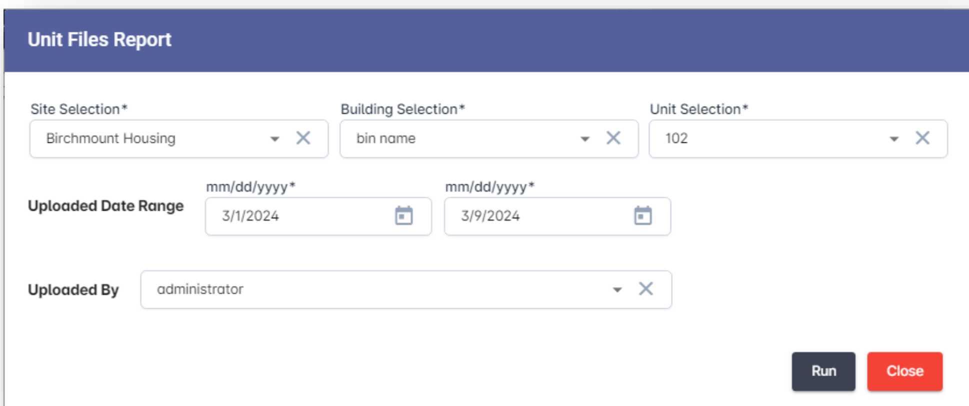
Building BIN: FL-02-02234

Site Name: Birchmount Housing

The report displays the *Site Name, Site Number, BIN, Building Name, Unit Number, Created By*, and *Time Stamp*.

### Units Email Report

1. Click on *Email Report*.




2. Select the *Site, Building, Date Range*, and *System User*.
3. Then click *Run*.

**Unit Files Report**

Date Range:03/01/2024 - 03/09/2024

| Site Name: | Site Number: | Bin: | Building Name: | Unit #: |
| --- | --- | --- | --- | --- |
| Birchmount Housing | 20102010 | FL-02-02234 | bin name | 102 |

**File Name:** HDS Training WorkShop
**File Type:** .docx
**Uploaded By:** administrator
**Uploaded On:** 03/05/2024 11:56 AM

**File Name:** Files Validation message
**File Type:** .docx
**Uploaded By:** administrator
**Uploaded On:** 03/05/2024 11:56 AM

The report displays the *Site Name, Site Number, BIN, Building Name, Unit Number, Uploaded By*, and *Time Stamp*.

# Tenant

The *Tenant* work area displays information about the individual(s) that meet the criteria to occupy a unit. This work area is used to manage tenant records and view/print reports.

# Search

Upon access to the Tenant work area, you will see the *Search* section.

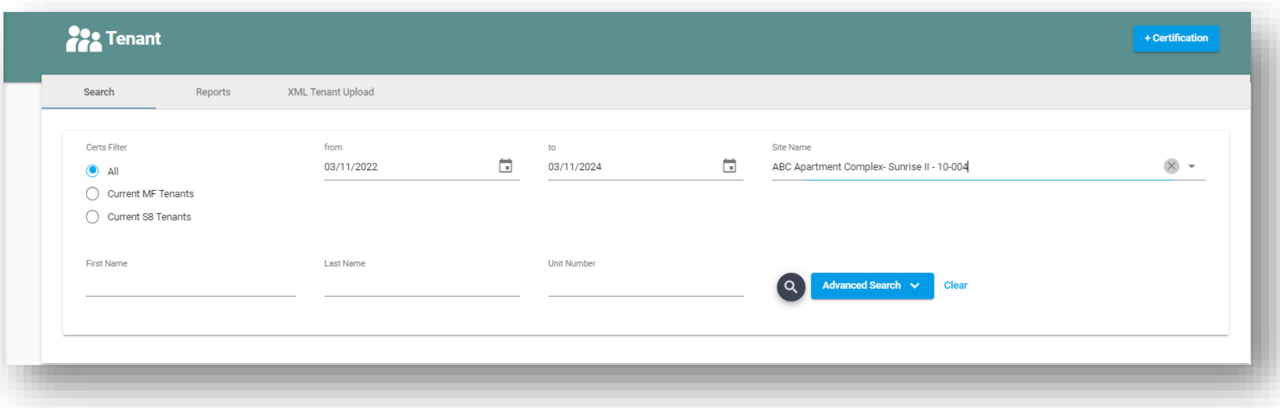
**To search for a Tenant:**

2. Enter the search criteria for the Tenant.
    a. Select *All* to retrieve all tenant records. Enter the timeframe that your tenant(s) occupied the unit.
    b. Select *Current MF Tenants* to retrieve all records for tenants who currently reside in a multifamily unit.
    c. Select a *Site Name* to all retrieve records of tenants based on the date parameter selected.
    d. Click *Search* to retrieve search results.

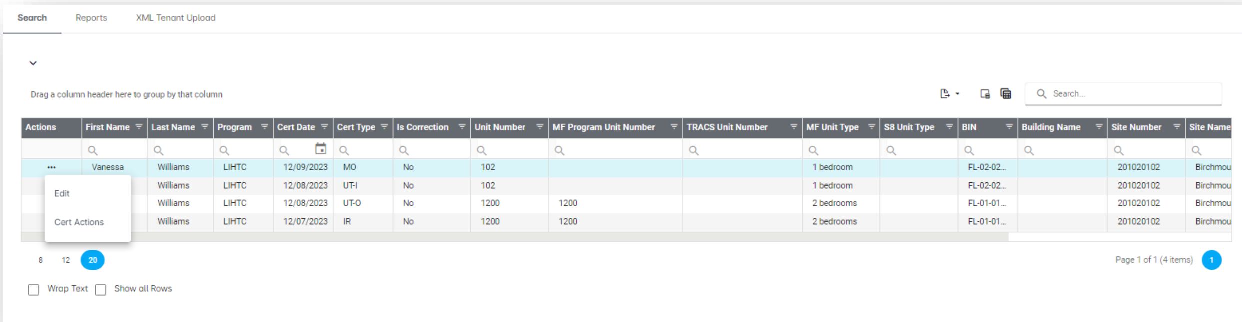
To search for a specific Tenant:

    a. Enter the First/Last Name and the Unit Number.
    b. Click *Search* to retrieve search results.

3. To view additional search options, such as *Program, BIN, Building Name and Site Number*, click *Advanced Search*
4. Click *Clear* to begin a new search.

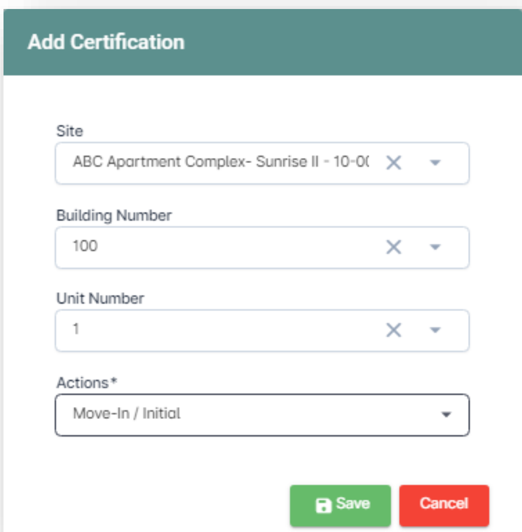



From the Tenant search grid users can access certification details by double clicking on a desired row or clicking *Edit* in the *Actions* column.




**To add a Tenant Certification:**

1. From the Search area Click *Certification* located in the top-right corner.
2. Select the *Site Name*, *Building Number*, and *Unit Number* and *Action (MI, IC, MO, UT)* from the dropdown menu.
3. Click *Save* to complete your Actions.

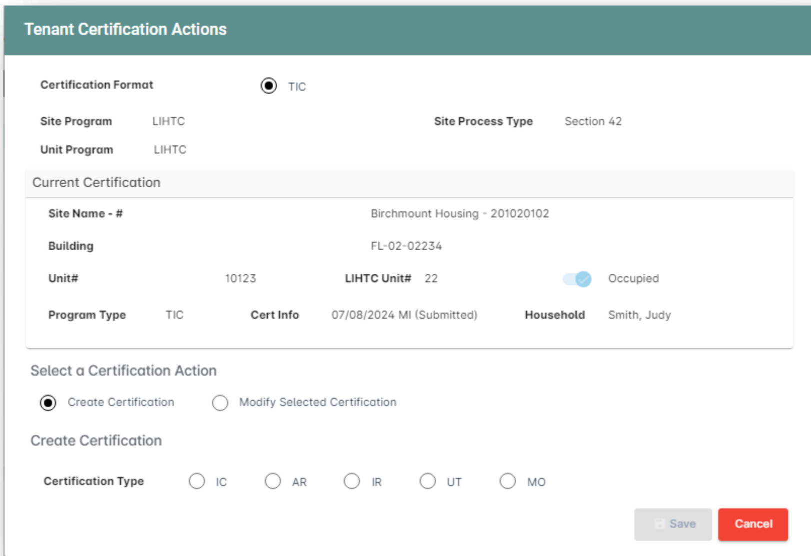



Users will then have access to the tenant certification. Certification Information and details of the tenant member can be entered from this area.

# Creating Certifications from the Tenant Area

## Certification Actions

The Certification Actions box displays information about the certification and the programs applied at the site, unit, and tenant level (when applicable).

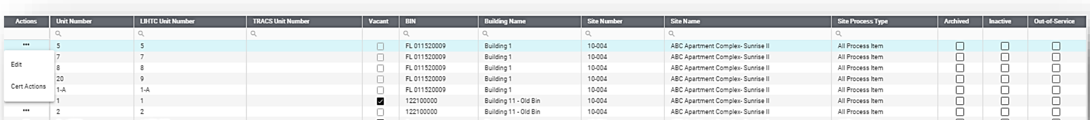



Each certification that is currently applied to the unit will be displayed in the *Current Certification* section. More than one cert can be present at a time. The unit's status, occupied or vacant, is shown above. The available certification options are displayed when you click *Create Certification*. The certification options for a unit are based on the tenant's last certification. Certifications must be "*Submitted*" to enable the certification options; *Income Certification (IC), Unit Transfer (UT), Annual Recertification (AR),* and *Move-Out (MO).*

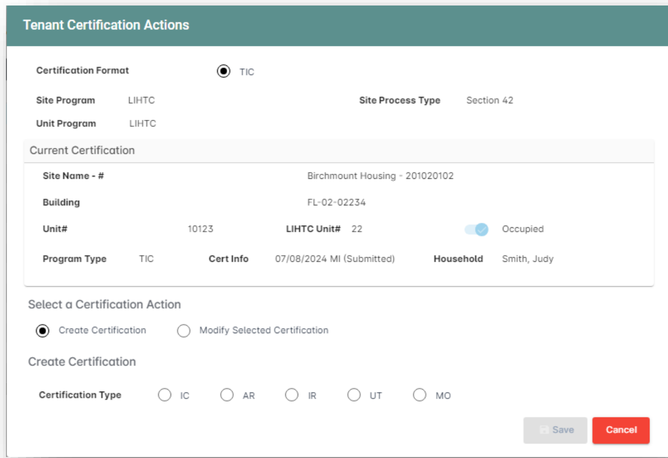
## Creating Tenant Certifications

**To create a new certification**:

1. Select *Cert Actions* in the *Actions* column of the record.



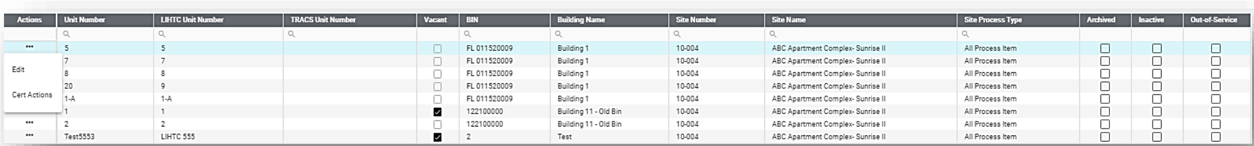
2. Select a *Certification Type* and *Effective Date*. If you select a *UT*, you must select the unit the certification will be transferred to.




3. Click *Save* to complete your actions.

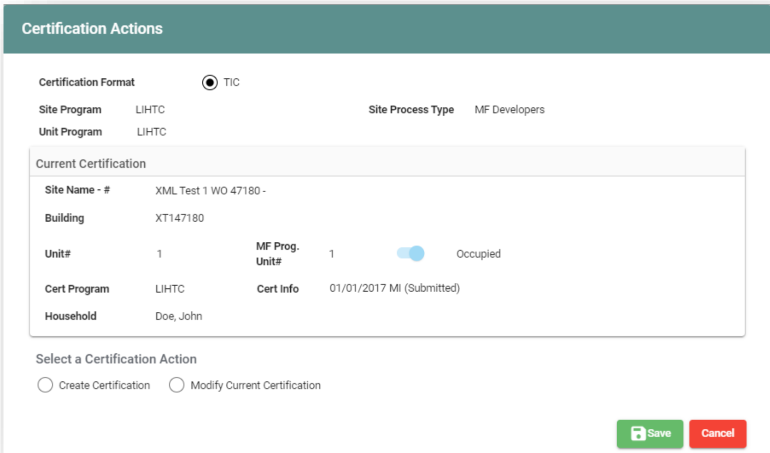
**To make corrections to a certification (LIHTC/HOME):**

1. Select *Cert Actions* from the *Actions* column of selected the record.



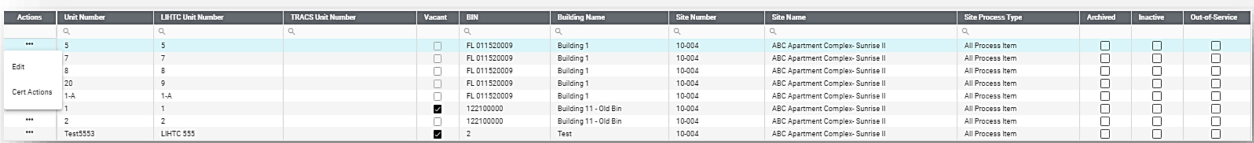

2. Select *Modify Selected Certification*.

3. Click one of the following actions:
   a. **Correct** – An unsubmitted copy of the tenant certification will open. The previous version of the certification can be accessed from the Priors side tab.
   b. **Unsubmit/Submit**– To update the most recent certification click *Unsubmit*. A validation message will appear click *Yes* to proceed. The certification can now be updated. Once the certification has been updated click *Submit*.
   **c.** **Delete** – The certification will be removed.
4. Click *Save* to complete your actions.




**To make corrections to a certification:**

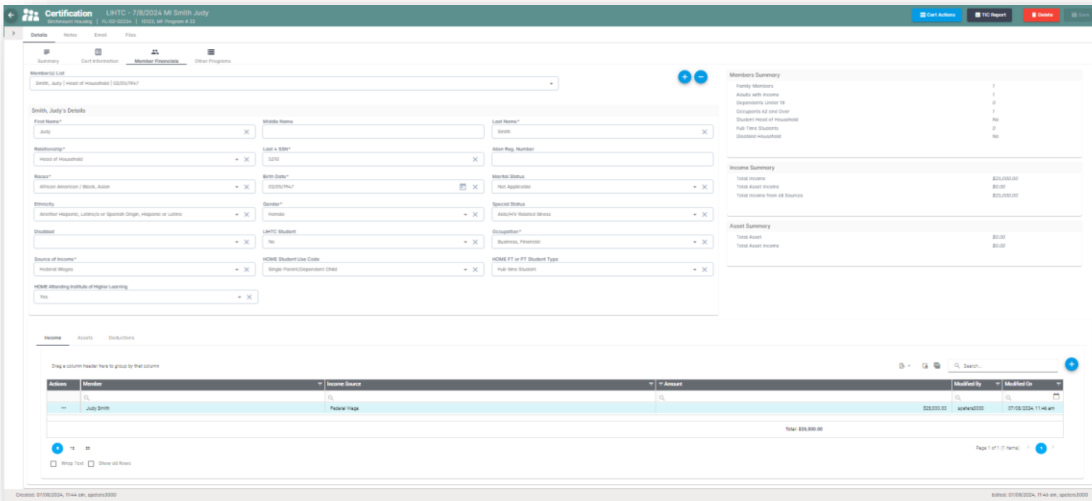
1. From the *Actions* select *Cert Action.*




2. Choose *Modify Current Certification*.
3. Click one of the following actions:
    a. **Correct** – An unsubmitted copy of the tenant certification will open.
    b. **Unsubmit** or **Submit** – If you select **Unsubmit**, the certification will be unsubmitted. If you click **Submit**, the certification will be submitted.
    c. **Delete** – The certification will be removed.
4. Click *Save* to complete your actions.

## Summary

The *Summary* displays certification details which have been uploaded via XML or manually entered. This tab is read-only and shows details about the *Programs, Household, Income, Rent and Designations*, and *Assets.* Click the blue icons to view the Income and Rent Limits in the *Income Average Designation* section.



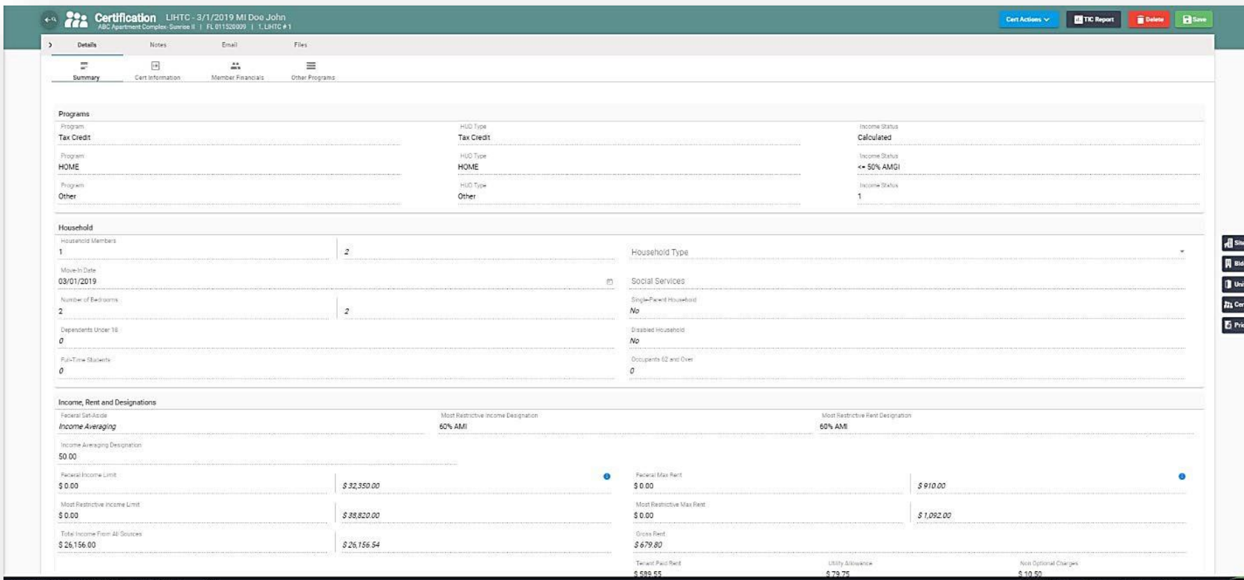
*"Created"* and *"Edited"* timestamps are located at the bottom of each certification. The timestamp displays the Date and Time the certification was Edited or Created, the username of the individuall that manually created or uploaded the certification via XML.

**IMPORTANT NOTE**

If you try to make updates to the Move-In Date on a Move-In or Initial Cert, a warning stating, *"Modifying the Move-In Date field will update all related certifications, do you wish to continue?".* If you choose to continue, the system will update the Move-In Date for all related certs in that household.

## Cert Information

Use this section to view and/or enter certification information. Most details on this page have been are read-only. *Most Restrictive Income Description* and *Most Restrictive Rent Description* are two mandatory fields that need to be populated. *See Tenant Table for Tenant>Details>Cert Info/Certification Information field descriptions.*



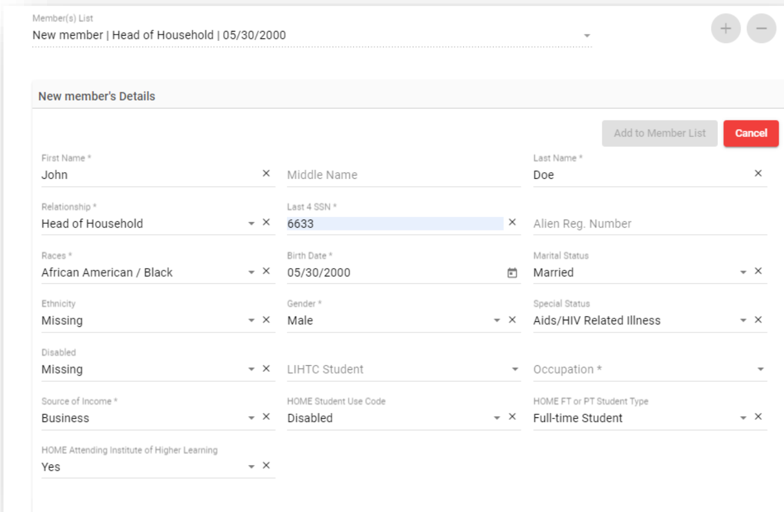

| IMPORTANT NOTE |
| --- |
| On the qualifying certification (MI or IC) if you change the Move-In Date a validation message will be displayed *"Modifying the Move-In Date field will update all related certifications, do you wish to continue?".* If you choose to continue, the system will update the Move-In Date for all related certs in that household. |
| Standard text (the reported value) and the one on the right is in italics and is the HDS value. |

### Member Financials

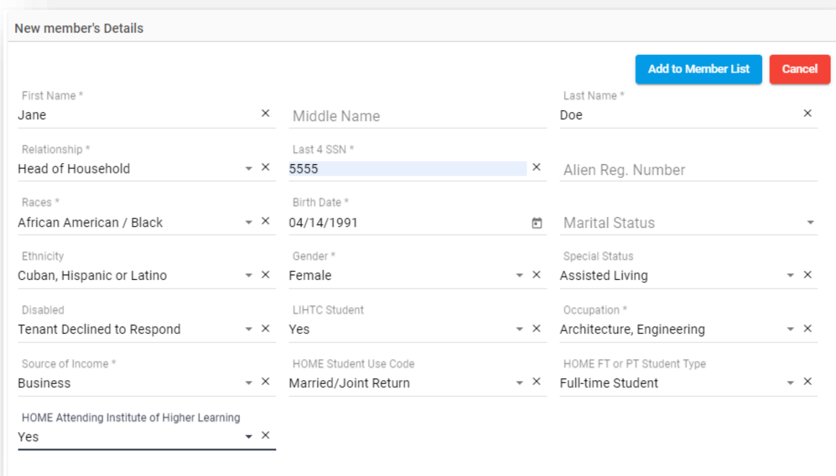
*Member Financials* allows you to view personal details about the head of the household and financial information for the entire household. To view details of an existing Tenant Member, select the name from the **Members List** box.

**To add a New Member:**

1. Click Add Member



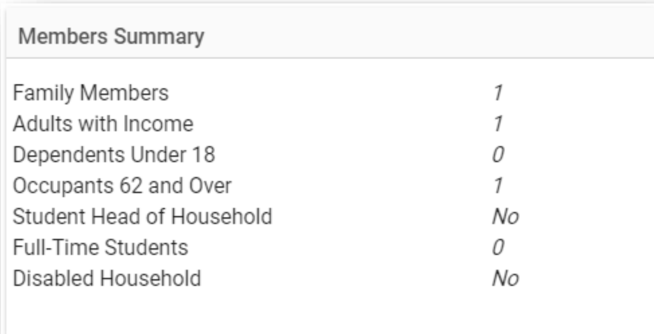

2. Enter the Tenant Member information in the **New Member's Details** box. The mandatory fields contain an asterisk and must be completed to enable **Add to Member List**.
3. Once the information has been entered, click **Add to Member List**.




| IMPORTANT NOTE |
| --- |
| The Head of Household cannot be deleted. |

## Members Summary

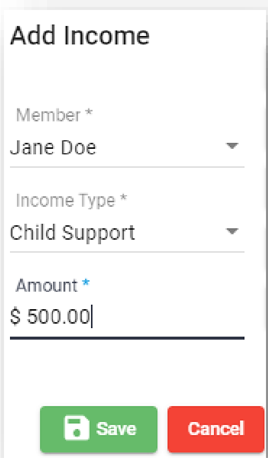
The *Members Summary* displays the type of members who reside in the unit.



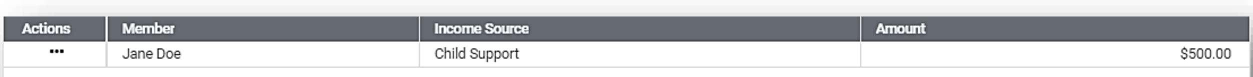

## Income

**To add an Income:**

1. Click the plus sign.
2. Select a tenant member from the *Member* dropdown and choose an Income description from the Income *Type* dropdown and enter an *Amount*.



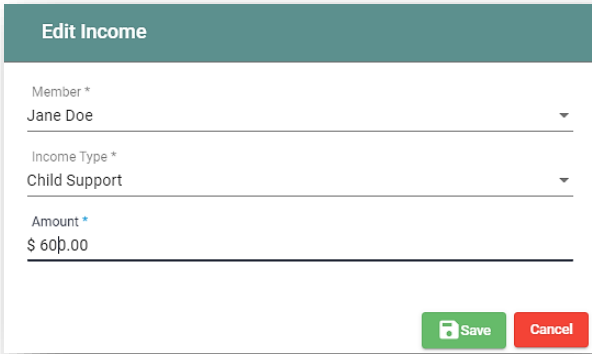

3. Click *Save* to complete your actions.



| Actions | Member | Income Source | Amount |
|---|---|---|---|
| ••• | Jane Doe | Child Support | $500.00 |

**To edit a record:**

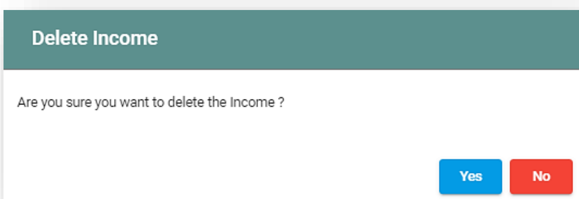
1. Select *Edit* in the *Actions* column of the desired record.
2. Update the record.




3. Click *Save* to complete your actions.

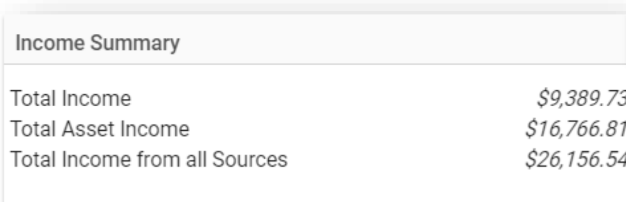
| Actions | Member | Income Source | Amount |
|---|---|---|---|
| ••• | Jane Doe | Child Support | $500.00 |

To remove a record, select *Delete* in the ***Actions*** column of the desired record.




## Income Summary

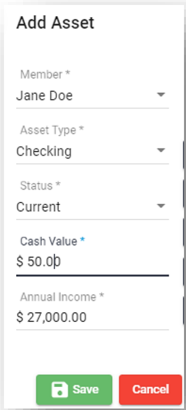
This section summarizes the income of all members who reside in the Unit. The system is now displaying income rounding to the nearest cents.



## Assets

**To add new Assets:**

1. Click the plus sign.
2. Select a **Member**, **Asset Type**, and **Status** and enter the **Cash Value** and **Annual Income** amounts.

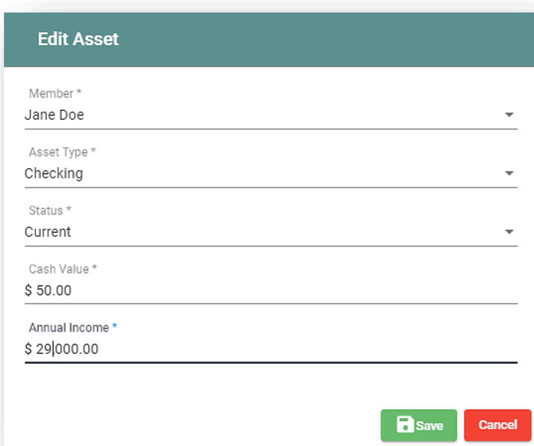



3. Click *Save* to complete your actions.

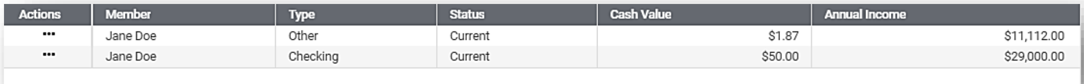
| Actions | Member | Type | Status | Cash Value | Annual Income |
|---|---|---|---|---|---|
| ••• | Jane Doe | Other | Current | $1.87 | $11,112.00 |
| ••• | Jane Doe | Checking | Current | $50.00 | $27,000.00 |

**To edit an Asset:**

1. Select *Edit* in the *Actions* column of the desired record.
2. Update the records in the *Edit Asset* box.

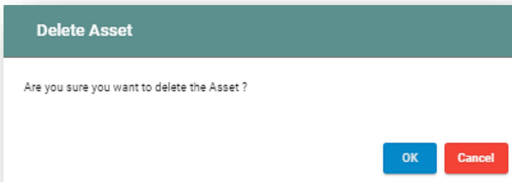



3. Click *Save* to complete your actions.



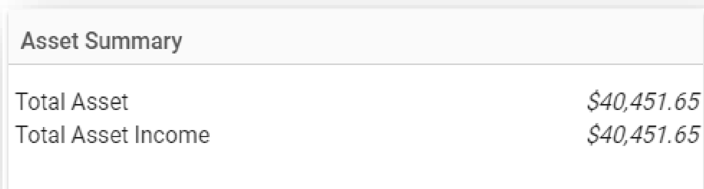
| Actions | Member | Type | Status | Cash Value | Annual Income |
|---|---|---|---|---|---|
| ••• | Jane Doe | Other | Current | $1.87 | $11,112.00 |
| ••• | Jane Doe | Checking | Current | $50.00 | $29,000.00 |

To remove a record, select *Delete* in the *Actions* column of the desired record.




## Asset Summary

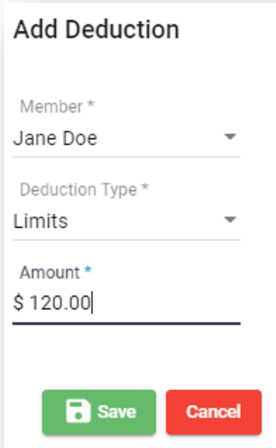
This section summarizes the assets of the members who reside in the unit. The system displays the income rounded to the nearest cent.



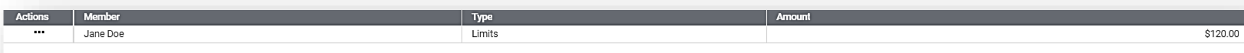

## Deductions

**To add a new Deduction:**

1. Click the plus sign.
2. Select a tenant from the *Member dropdown*, *Deduction Type* and enter *Amount*.

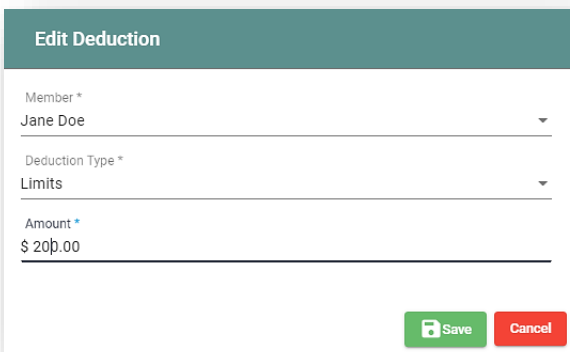



3. Click *Save* to complete your actions. Note that deductions do not apply to the Tax Credit program.

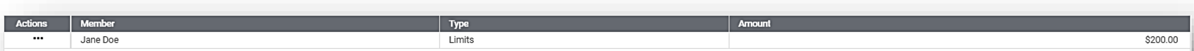



To edit a Deduction:

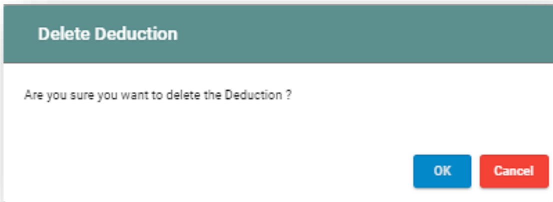
1. Click *Edit* in the *Actions* column of the desired record.
2. From the *Edit Deduction* box update the record.



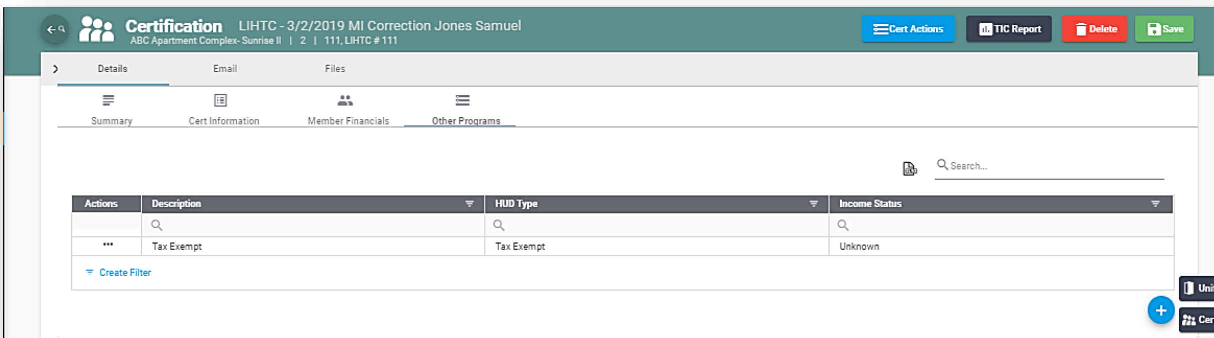

3. Click *Save* to save the changes.



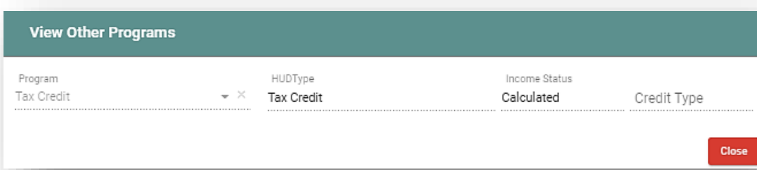

To remove a record, select *Delete* in the *Actions* column of the desired record.




## Other Programs

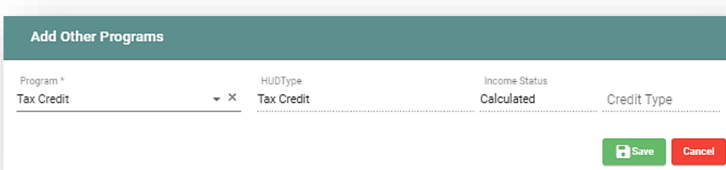



To view an Other Program record, select *View* in the *Actions* menu.



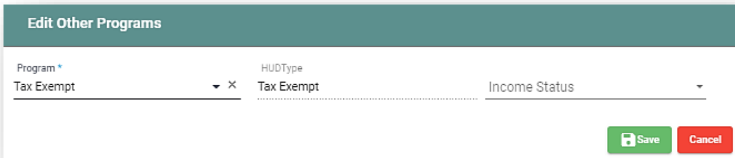

**To add Other Program:**

1. Click *Add Other Program.*
2. Select an option from the *Program* menu.
3. Click *Save* to confirm your actions.



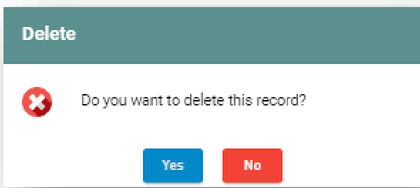
To edit an Other Program record:

1. Select *Edit* in the Actions menu.
2. Update the record and click *Save* to confirm your actions.



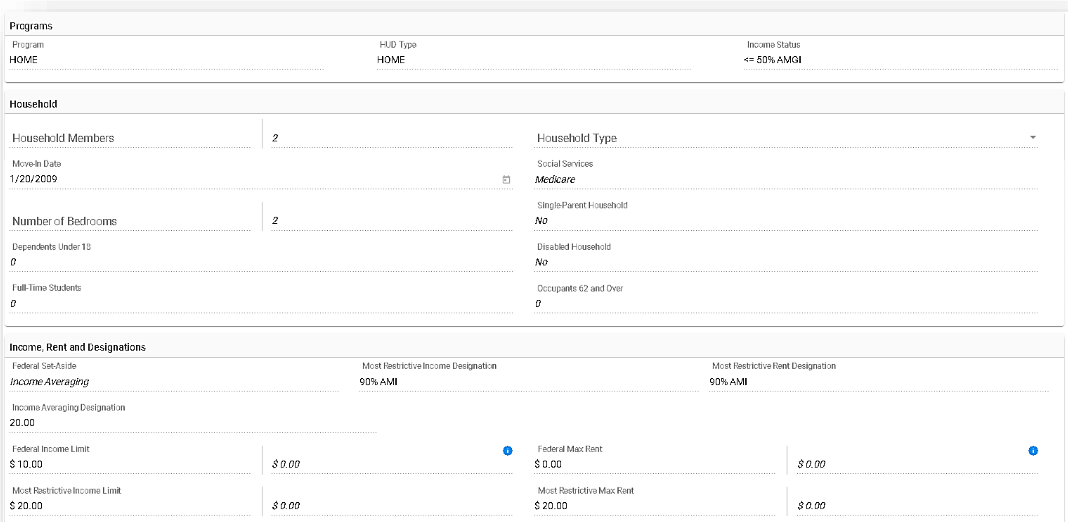

To remove a record:

1. Select *Delete*
2. Click *Yes* to confirm your actions.

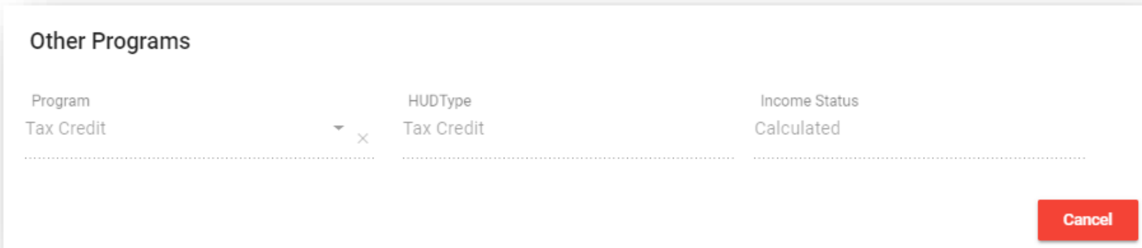



To view program details for “Submitted” certifications, click the icon. The **Other Program** box will open and display program details of the selected row. After reviewing, click **Cancel** to close the popup screen. Be sure to save your change before leaving the Tenant work area.

## HOME Program



**Tax Credit Program**



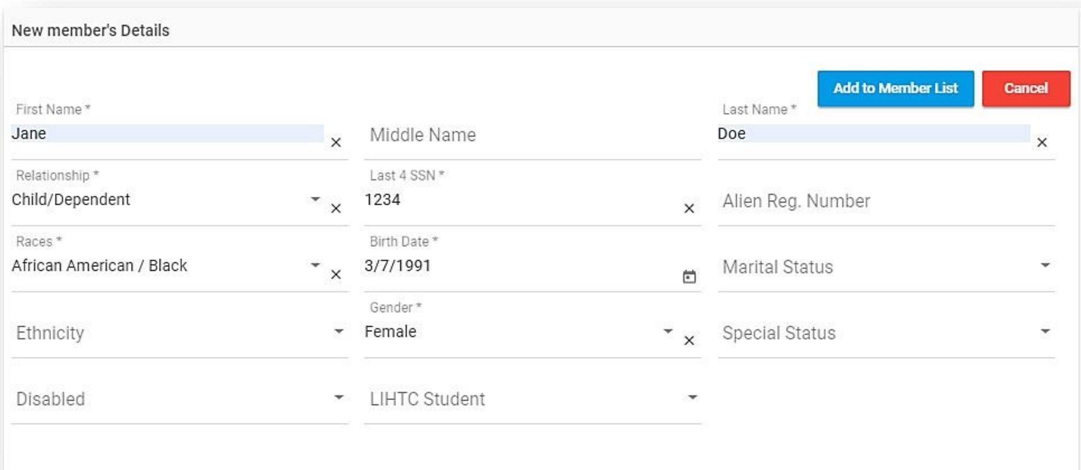

| IMPORTANT NOTE |
| --- |
| Income Status percentages are displayed in the last column for each program. |

# Member Financials

*Member Financials* allows you to view personal details about the head of the household and financial information for the entire household. To view details of an existing Tenant Member, select the name from the **Members List** dropdown.

To add a new Member:

1. Click the plus sign.
2. Enter the Tenant Member information in the *New Member's Details* box. The mandatory fields contain an asterisk and must be completed to enable *Add to Member List.*
3. Once the information has been entered, click *Add to Member List.*



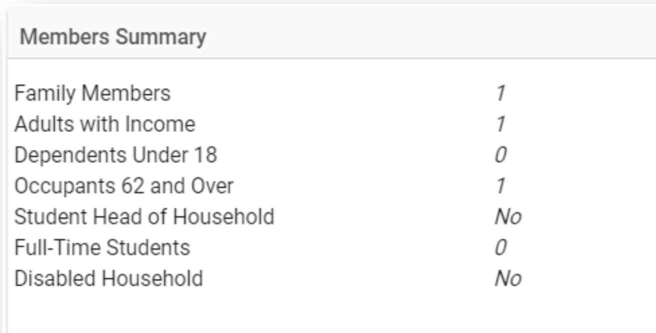

To remove a member, click ***Delete Member.***

| **IMPORTANT NOTE** |
| --- |
| Note: You cannot delete the Head of Household.<br>standard text (the reported value) and the one on the right is in italics and is the HDS value. |

## Members Summary

The *Members Summary* categorizes the household members by is an overview of type of members who reside in the Unit.

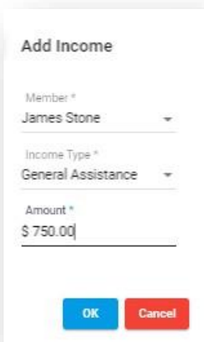
## Member Financials




## Income

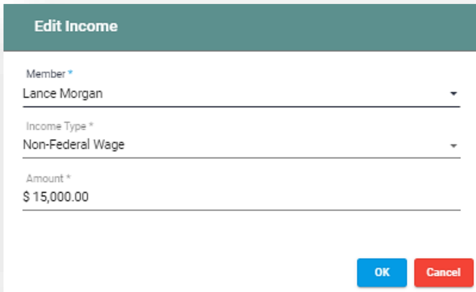
To Add Income:

1. Click *the plus sign.*
2. Select a **Member** and **Income Type** from the dropdown menu and enter the **Amount**.
3. Click **OK** to complete your actions.

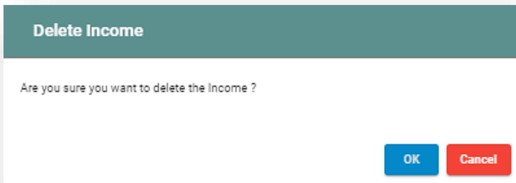



To edit a record:

1. Click **Edit**
2. Update the record.
3. Click **OK** to save the changes.

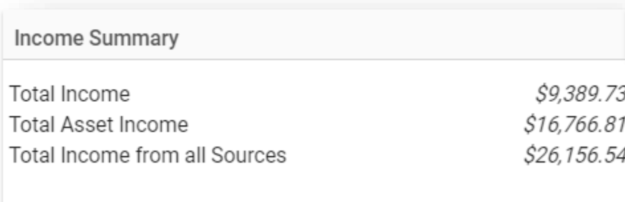



To remove a record, click **Delete**




## Income Summary

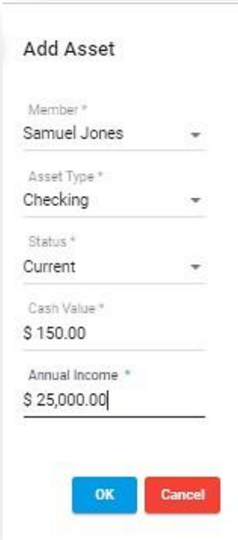
This section summarizes the income of all members who reside in the Unit. The system is now displaying income rounding to the nearest cents.




## Assets

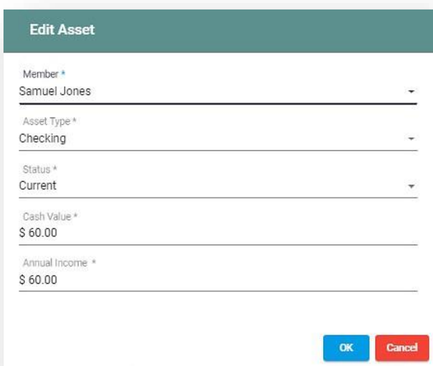
To Add New Assets:

1. Click *the plus sign.*
2. Select a *Member, Asset Type,* and *Status* from the dropdown menu and enter the *Cash Value* and *Annual Income* amounts.
3. Click *OK* to complete your actions.

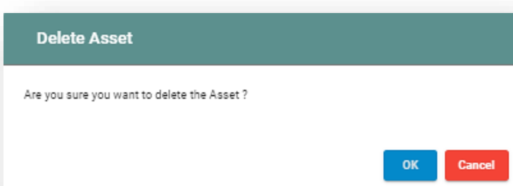



To Edit an Asset:

1. Select *Edit* from the *Actions* menu.
2. Update the record.
3. Click *OK* to complete your actions.

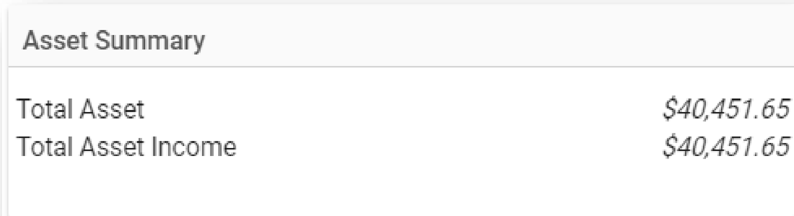



To remove a record, click **Delete**.



## Asset Summary

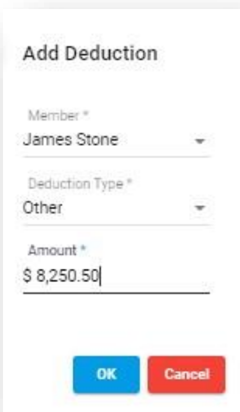
This section summarizes the assets of the members who reside in the Unit. The system displays the income rounded to the nearest cent.




## Deductions

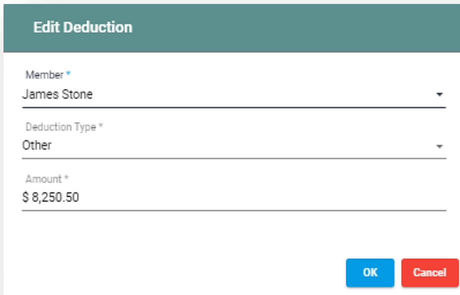
To Add New Deduction:

1. Click *the plus sign.*
2. Select a *Member* and *Deduction Type* from the dropdown menu and enter the *Amount.*
3. Click *OK* to complete your actions. Note that deductions do not apply to the Tax Credit program.

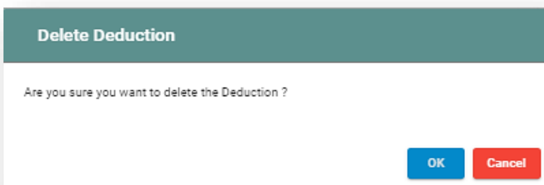


**To edit a Deduction:**

1. Click *Edit* from the *Actions* column of the desired record.
2. Update the record the *Edit Deduction* box
3. Click *OK.*




To remove a record, click *Delete*.




**IMPORTANT NOTE**

To associate a *Site* to a user's profile, click the plus button under the Request Site Access. Enter the Site Name and Site Number then click Add Site.

To remove the Site access request, select Delete from the Actions menu.

## Tenant Table

| Field/Option | Description/Usage |
|---|---|
| Certification>Details>Summary - *Programs* | |
| **Program** | The type of program or programs for which this event is qualified |
| **HUD Type** | This complex type holds the information about which program or programs for which an event is qualified |
| **Income Status** | AMGI Percentage for Program Income |
| Certification>Details>Summary - *Household* | |
| **Household Members** | Number of members as reported and calculated by HDS |
| **Household Type** | Identifies the reported household category.<br>"NA" - *Not Applicable,* "EL"- *Elderly,* "FA" – *Family,* HO" – *Homeless,* "RC" - *RCAC,*"DS" – *Displaced,* "SN" - *Special Needs NA, Elderly, Family, Homeless, RCAC, DS* and *Special Need* |
| **Move-In Date** | Date the household occupied the Unit |
| **Social Services** | Blank or a value selected manual from the *HDS Social Services* reference table |
| **Number of Bedrooms** | As reported and as entered in HDS |
| **Single-Parent Household** | Yes or No as calculated by HDS |
| **Dependents Under 18** | Calculated by HDS |
| **Disabled Household** | Yes or No as calculated by HDS |
| **Full-Time Students** | Calculated by HDS |
| **Occupants 62 and Over** | Calculated by HDS |
| Certification>Details>Summary - *Income, Rent, and Designations* | |
| **Federal Set-Aside** | As reported in the certification |
| **Most Restrictive Income Designation** | The most restrictive income designation as reported by the owner |
| **Most Restrictive Rent Designation** | The most restrictive rent designation reported by the owner |
| **Income Averaging Designation** | If the set-aside is *Income Averaging*, then this field displays the *Income Designation* submitted on the certification. Legal values are 20%, 30%, 40%, 50%, 60%, 70%, and 80% |
| **Federal Income Limit** | The LIHTC income limit associated with the Federal Set-Aside. The HDS value is calculated based on the high-watermark income limits for the Building and certification date |
| **Federal Max Rent** | The maximum permitted Tenant rent based on the Federal Income Limit |
| **Most Restrictive Income Limit** | The LIHTC income limit associated with the Most Restrictive Income Designation. The HDS value is calculated based on the high-watermark income limits for the Building and certification date |
| **Most Restrictive Max Rent** | The maximum permitted Tenant rent based on the Most Restrictive Income Limit |
| **Total Income from All Sources** | Total of all income and asset income |
| **Gross Rent** | The sum of Tenant Paid Rent, Utility Allowance, and Non-Optional Charges |
| **Tenant Paid Rent** | As reported in the certification |
| **Utility Allowance** | As reported in the certification |
| **Non-Optional Charges** | As reported in the certification |
| **Wages Total** | The sum of income types B = Business, F = Federal Wage, M = Military Wage, and W = Non-Federal Wage |

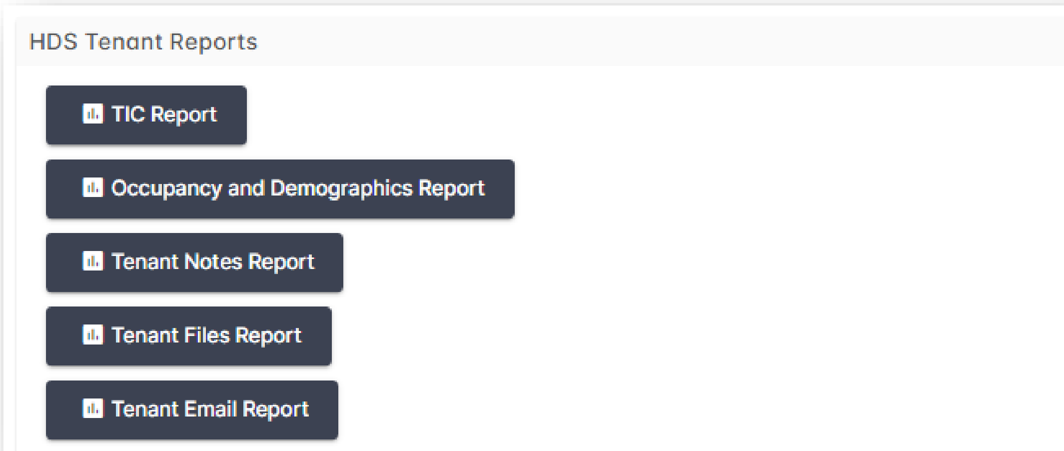
| | |
|---|---|
| **Social Sec Total** | The sum of income types PE = Pensions, SI = Supplemental Security Income, and SS = Social Security |
| **Public Assist Total** | The sum of income types T = TANF (Formerly AFDC) and G = General Assistance |
| **Other Total** | The sum of income types CS = Child Support, I = Indian Trust, N = Other Non-Wage Source, and U = Unemployment |
| **Total Income** | As calculated by HDS. Does not include Asset Income |
| Certification>Details>Cert Info - *Source of Federal Rent Assistance-As reported in the certification* | |
| **Federal Rent assistance Amount** | As reported in the certification |
| Certification>Details>Cert Info -*Source of Other Non-Federal Rent Assistance-As reported in the certification* | |
| **Other Non-Federal Rent Assistance Amount** | As reported in the certification |
| **Total Monthly Rent Assistance** | The total amount of both federal and non-federal rental assistance |
| Certification>Details>Cert Info - *Assets* | |
| **Cash Value** | As reported and as calculated by HDS |
| **Asset Income** | As reported and as calculated by HDS |
| **Certification Type** | Displays the certification type for the certification. "MI" - *Move In,* "MO" - *Move Out,* "TI" - *Transfer In,* "TO" - *Transfer Out,* "R"- *Recertification,* "A" – *Adjustment,* "IC" – *Initial* |
| **Effective Date** | This is the original date that this compliance event occurred |
| **Self-Certification** | Verifies that Tenant has self-certified their income |
| **Correction** | Verifies if updates have been made to the previous record |
| **Original Event Date** | Represents the date the XML file was uploaded, or data entered manually |
| **Correction Effective Date** | Date of the certification update |
| **Event Created** | Date of the compliance event |
| **Old Move-In Date** | The original move in date for the household for which this event is reporting |
| **Move-In Date** | Date the Tenant moved into the Unit |
| **Household Type** | Identifies the household category. NA" - *Not Applicable,* "EL" – *Elderly,* "FA" – *Family,* "HO" – *Homeless,* "RC" – *RCAC,*"DS" – *Displaced,* "SN" - *Special Needs NA, Elderly, Family, Homeless, RCAC, DS* and *Special Needs* |
| **Employment Type** | Identifies the field of employment for members in a household. “NA" - *Not Applicable,* "A" – *Agriculture,* "B" - *Business/Office,* "FTS" - *FT Student, No Special Conditions,* "GS" - *Government/Public Service,* "HM" – *Homemaker* ,"IM" - *Industrial/Manufacturing,* "NE" - *Not Employed,* "NS" |
| | - *Not Skilled/Unskilled,* "R" – *Retired,* "SE" - *Self Employed "SS”- Skilled/Specialized,* "TP" - *Technical/Professional* |
| **Unit Type** | This is identifying how the unit is being utilized in conjunction to the event that is being transmitted |
| **Number of Occupants** | Number of tenants which reside in the Unit |
| **Utility Type** | Identifies the type of utilities in the Unit |
| **Social Services** | Identifies what services are provided for the household or tenant. The descriptions are populated from the Social Services Reference Table in the Windows application |
| **Single Parent Household** | Identifies the marital status of the Head of Household member |

| | |
|---|---|
| **All Student Household** | If all household members are full-time students, select **Yes**. If at least one household member is not a full- time student, select **No** |
| **Utility Allowance** | The amount of monies allocated towards a Unit's utility costs which is set by a utility allowance schedule which is published either by *HUD*, *Rural Development* or the *Public Housing Authority* |
| **Student Use Code** | If all household members are full-time students, identify the qualifying exception. Enter NA for a household which is not comprised of all full-time students |
| Certification>Details>Cert Info - *Rent Income Certification Details* | |
| **Effective Date of Most Recent Income Certification** | The Effective Date of the most recent certification of LIHTC income. This is populated when income is not certified, For example, a self-certification |
| **Household Income at Most Recent Income Certification** | Household income at the time of the most recent LIHTC qualification date |
| **Household Size at Most Recent Income Certification** | The size of the household on the Effective Date of the most recent certification of LIHTC income. This is populated when income is not certified, For example, a self-certification |
| Certification>Details>Cert Info - *Qualification Details* | |
| **LIHTC Qualification Date** | The most recent qualification date for this event |
| **Household Income at Most Recent Qualification Date** | Household income at the time of the most recent LIHTC qualification date |
| **Household Size at Most Recent Qualification Date** | Household size at the time of the most recent LIHTC qualification date |
| Certification>Details>Cert Info - *Income, Rent, and Designations* | |
| **Federal Set-Aside** | The set-aside value from the Building LIHTC screen |
| ***Most Restrictive Income** | The most restrictive income set-aside percentage currently applied to the household. This value may be the same as or less than the *Federal Income Designation* amount. The values are populated from the Unit Type reference table in the Windows application |
| ***Most Restrictive Rent** | The most restrictive rental set-aside percentage currently applied to the household. This value may be the same as or less than the Federal Income Designation amount. The values are populated from the Unit Type reference table in the Windows application |
| **Income Averaging Designation** | If the Building set-aside is Income Averaging, this field is mandatory for a Tax Credit certification and identifies which Unit designation applies: 20%, 30%, 40%, 50%, 60%, 70%, or 80% |
| **Federal Income Limit** | Total amount of income allowed based on the number of individuals in the Unit and the income limit assigned to the Site and Building. Click the icon next to the Federal Income Limit to view the high-water mark. |
| | The system automatically calculates LIHTC income and rent limits based on the high-water mark. The fields which contain an asterisk must be populated for the save button to become enabled. |
| **Federal Rent Limit** | The maximum amount of rent which can be allowed based on the number of individuals in the unit and income limit assigned to the property. Click the icon next to the Federal Rent Limit to view the high-water mark. The system automatically calculates LIHTC income and rent limits based on the high-water mark. The fields which contain an asterisk must be populated for the save button to become enabled. |

| | |
|---|---|
| **Most Restrictive LIHTC Income Limit** | The LIHTC maximum allowable income for the Unit based on an Income Designation percentage that is lower than the Federal Income Designation |
| **Most Restrictive LIHTC Rent** | The LIHTC maximum allowable income for the Unit based on an *Income Designation* percentage that is lower than the Federal Income Designation |
| **Annual Income** | The total of amount reported for the household. |
| **Gross Rent** | Monthly rent including an estimated utility cost and non-optional charges |
| **Tenant Rent** | The rent that the Tenant is paying |
| **Utility Allowance** | The number of monies allocated towards a Unit's utility costs which is set by a utility allowance schedule which is published either by *HUD*, *Rural Development* or the *Public Housing Authority* |
| **Non-Optional Charges** | The amount of non-optional charges, such as mandatory garage rent, storage lockers, charges for services provided by the development |
| Certification>Details>Cert Info -*Assistance* | |
| **Sources of Federal Rent Assistance** | The program under which the federal subsidy portion of rent is being paid. If applicable, select a description |
| **Federal Rent Assistance Amount** | The Federal rental subsidy amount |
| **Source of Other Non-Federal Rent Assistance** | The program under which the non-federal subsidy portion of rent is being paid |
| **Other Non-Federal Rent Assistance** | The non-federal portion of the rent paid by a third party such as a housing authority |
| **Total Monthly Rent Assistance** | The total amount of both federal and non-federal rental assistance |
| Certification>Details>Cert Info - *Certification Totals* | |
| **Wages Total** | The sum of income types B = Business, F = Federal Wage, M = Military Wage, and W = Non-Federal Wage |
| **Social Sec Total** | The sum of income types of PE = Pensions, SI = Supplemental Security Income, and SS = Social Security |
| **Public Assist Total** | The sum of income types T = TANF (Formerly AFDC) and G = General Assistance |
| **Other Total** | The sum of income types of CS = Child Support, I = Indian Trust, N = Other Non-Wage Source, and U = Unemployment |
| **Asset Cash Value Total** | The total of the asset values |
| **Annual Asset Income Total** | Total amount of other assistance received by the household |
| Certification>Details>Cert Info - *Project Details* | |
| **Project ID** | Site Number |
| **Site Name** | The name of the Site which the XML has been uploaded to |
| **XML Upload Vendor Name** | Displays the name of the software the management company used to create the file such as Real Page, Boston Post etc. |
| **XML Upload Created Date** | The date the file was created |
| **XML Upload Reporting Start Date** | The beginning date of the date range for the transmission file |
| **XML Upload Reporting End Date** | The ending date of the date range for the transmission file |
| **XML Upload NAHMA Version** | The system only accepts versions 5.0 and 6.0. |
| If a field value is in standard text, it is a reported value. If it is italicized, it is an HDS calculated or stored value. If a field consists of 2 values, the one on the left is in standard text (the reported value) and the one on the right is in italics and is the HDS value. | |

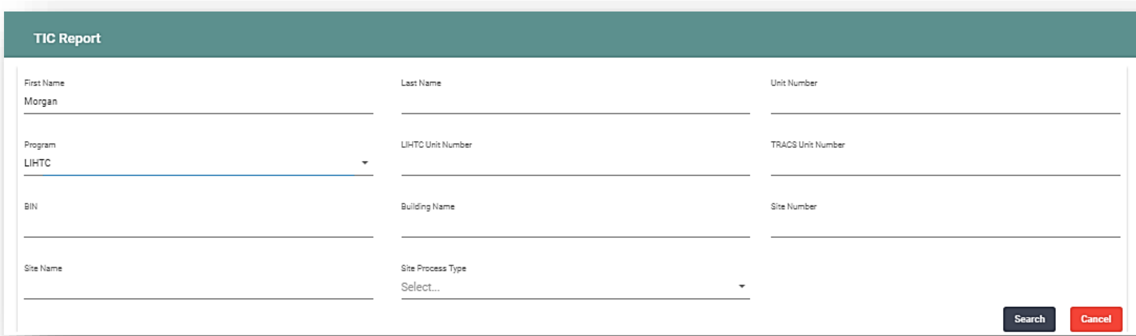
# Reports

This area allows users to access the *Tenant Income Certification, Occupancy and Demographic, Tenant Notes Tenant Files Report and Tenant Email Report.*

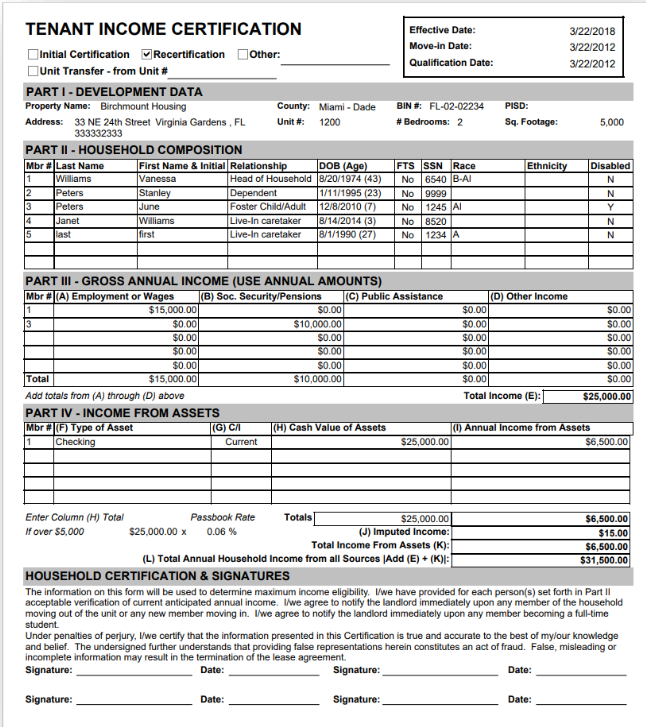



## TIC Reports

1. To view the Tenant Income Certification report, click *TIC Report* and enter the search criteria. Once the search criteria are entered, click *Search.*




2. Select the record and click *Create Report.*



**TENANT INCOME CERTIFICATION**

☐ Initial Certification ☑ Recertification ☐ Other: ____
☐ Unit Transfer - from Unit # ____

Effective Date: 3/22/2018
Move-in Date: 3/22/2012
Qualification Date: 3/22/2012

**PART I - DEVELOPMENT DATA**

Property Name: Birchmount Housing County: Miami - Dade BIN #: FL-02-02234 PISD:
Address: 33 NE 24th Street Virginia Gardens , FL 333332333 Unit #: 1200 # Bedrooms: 2 Sq. Footage: 5,000

**PART II - HOUSEHOLD COMPOSITION**

| Mbr # | Last Name | First Name & Initial | Relationship | DOB (Age) | FTS | SSN | Race | Ethnicity | Disabled |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Williams | Vanessa | Head of Household | 8/20/1974 (43) | No | 6540 | B-AI | | N |
| 2 | Peters | Stanley | Dependent | 1/11/1995 (23) | No | 9999 | | | N |
| 3 | Peters | June | Foster Child/Adult | 12/8/2010 (7) | No | 1245 | AI | | Y |
| 4 | Janet | Williams | Live-In caretaker | 8/14/2014 (3) | No | 8520 | | | N |
| 5 | last | first | Live-In caretaker | 8/1/1990 (27) | No | 1234 | A | | N |
| | | | | | | | | | |
| | | | | | | | | | |

**PART III - GROSS ANNUAL INCOME (USE ANNUAL AMOUNTS)**

| Mbr # | (A) Employment or Wages | (B) Soc. Security/Pensions | (C) Public Assistance | (D) Other Income |
|---|---|---|---|---|
| 1 | $15,000.00 | $0.00 | $0.00 | $0.00 |
| 3 | $0.00 | $10,000.00 | $0.00 | $0.00 |
| | $0.00 | $0.00 | $0.00 | $0.00 |
| | $0.00 | $0.00 | $0.00 | $0.00 |
| | $0.00 | $0.00 | $0.00 | $0.00 |
| Total | $15,000.00 | $10,000.00 | $0.00 | $0.00 |

*Add totals from (A) through (D) above* **Total Income (E): $25,000.00**

**PART IV - INCOME FROM ASSETS**

| Mbr # | (F) Type of Asset | (G) C/I | (H) Cash Value of Assets | (I) Annual Income from Assets |
|---|---|---|---|---|
| 1 | Checking | Current | $25,000.00 | $6,500.00 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

*Enter Column (H) Total* *Passbook Rate* **Totals** $25,000.00 **$6,500.00**
*If over $5,000* $25,000.00 x 0.06 % **(J) Imputed Income: $15.00**
**Total Income From Assets (K): $6,500.00**
**(L) Total Annual Household Income from all Sources |Add (E) + (K)|: $31,500.00**

**HOUSEHOLD CERTIFICATION & SIGNATURES**

The information on this form will be used to determine maximum income eligibility. I/we have provided for each person(s) set forth in Part II acceptable verification of current anticipated annual income. I/we agree to notify the landlord immediately upon any member of the household moving out of the unit or any new member moving in. I/we agree to notify the landlord immediately upon any member becoming a full-time student.
Under penalties of perjury, I/we certify that the information presented in this Certification is true and accurate to the best of my/our knowledge and belief. The undersigned further understands that providing false representations herein constitutes an act of fraud. False, misleading or incomplete information may result in the termination of the lease agreement.

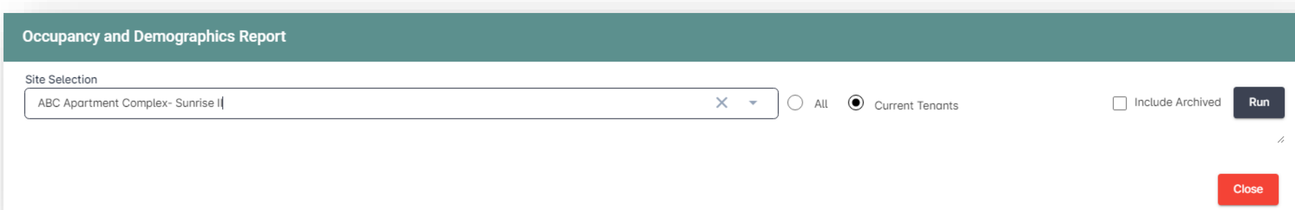
Signature: ____ Date: ____ Signature: ____ Date: ____

Signature: ____ Date: ____ Signature: ____ Date: ____

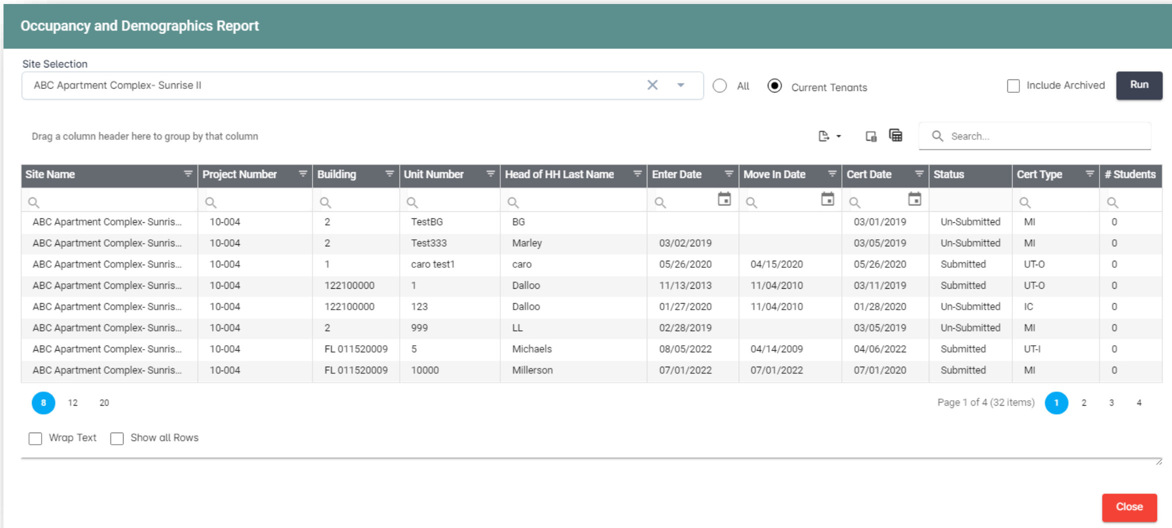
## Occupancy and Demographic Report

To view a list of previous and current tenant records:

1. Click *Occupancy and Demographics Report*.
2. Select the site name from the *Site Selection drop down*.
3. Select *All* to view details of all prior and existing tenants or select *Current Tenants* to view tenant details of tenants that currently occupy the unit. To retrieve archived sites, select *Include Archived*.

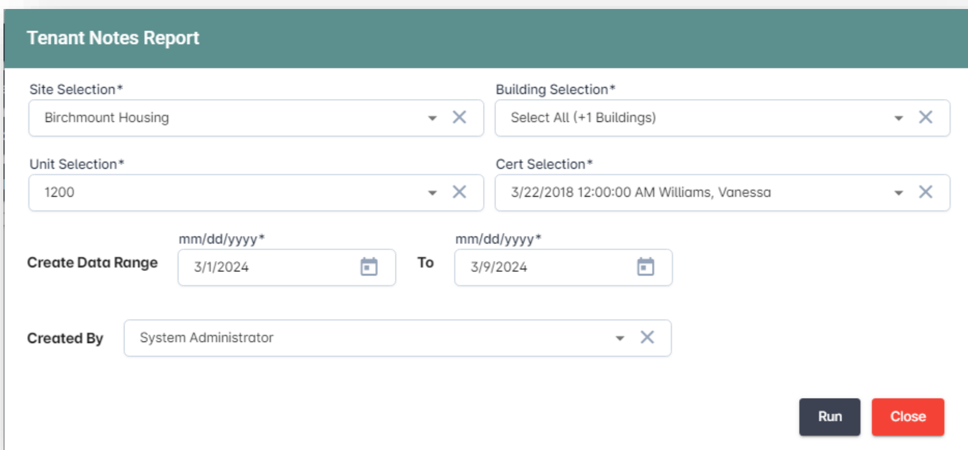



4. After selecting the search criteria click *Run.*




## Tenant Notes Report

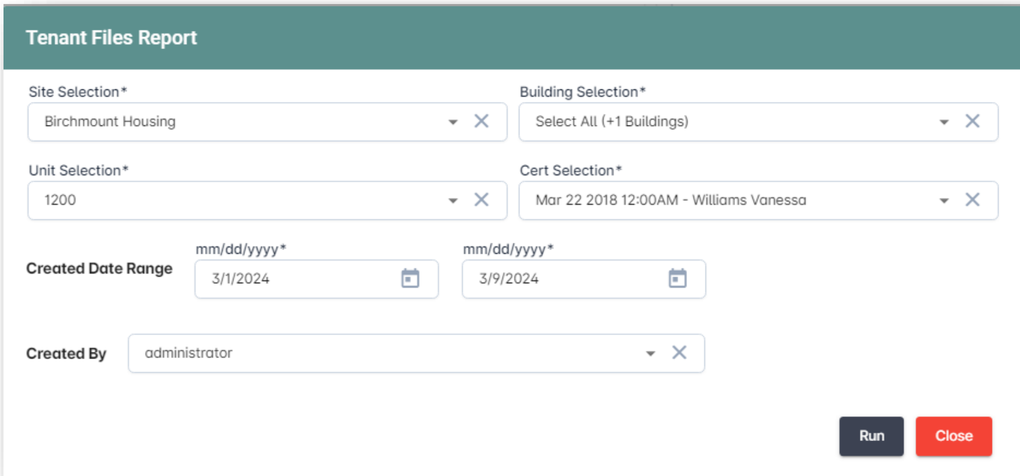
1. Click on *Notes Report*.



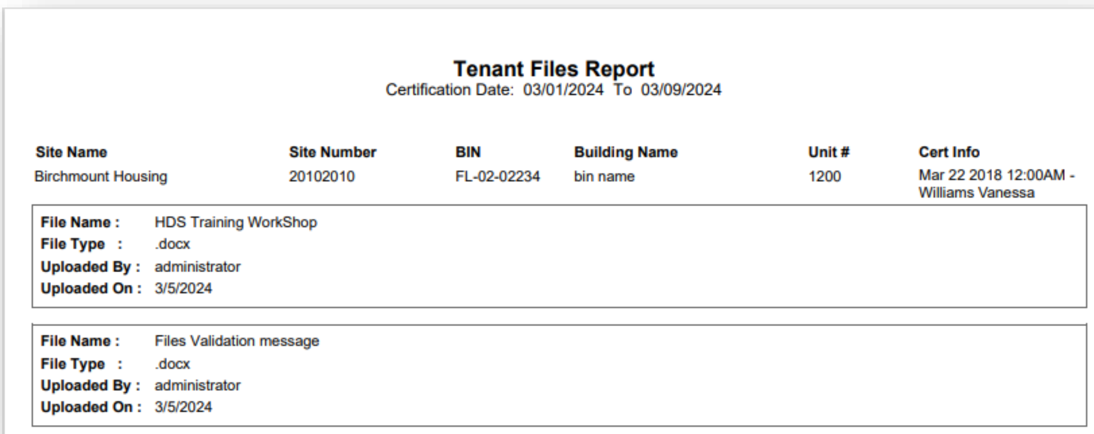

2. Select the *Site, Building, Unit, Cert Date, Date Range*, and *System User*.
3. Then click *Run*.

## Tenant Files Report

1. Click on *Files Report*.




2. Select the *Site*, *Building*, *Unit*, *Cert Date&TenantName*, and *Date Range*.
3. Select a user from the *Created By* drop down.
4. Then click *Run.*



**Tenant Files Report**
Certification Date: 03/01/2024 To 03/09/2024

| Site Name | Site Number | BIN | Building Name | Unit # | Cert Info |
|---|---|---|---|---|---|
| Birchmount Housing | 20102010 | FL-02-02234 | bin name | 1200 | Mar 22 2018 12:00AM - Williams Vanessa |

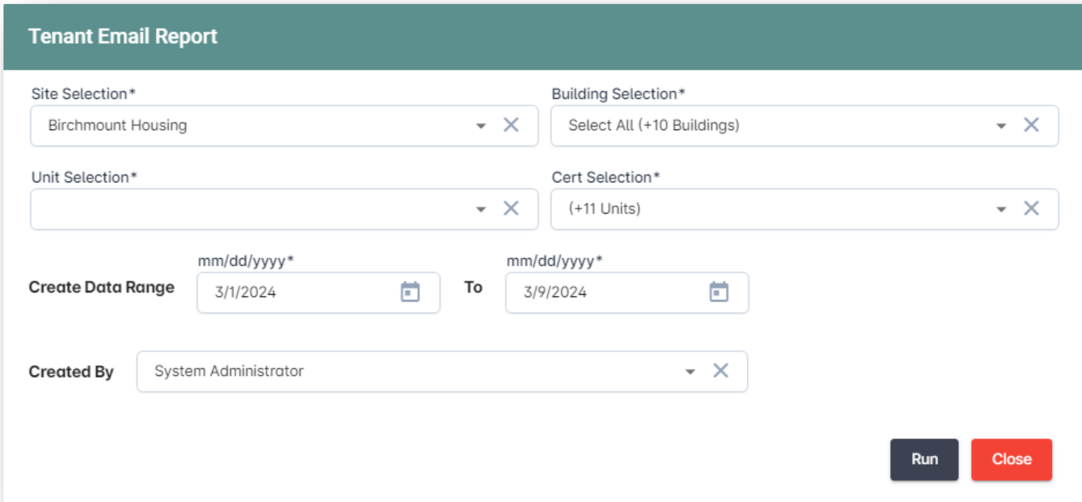
**File Name :** HDS Training WorkShop
**File Type :** .docx
**Uploaded By :** administrator
**Uploaded On :** 3/5/2024

**File Name :** Files Validation message
**File Type :** .docx
**Uploaded By :** administrator
**Uploaded On :** 3/5/2024

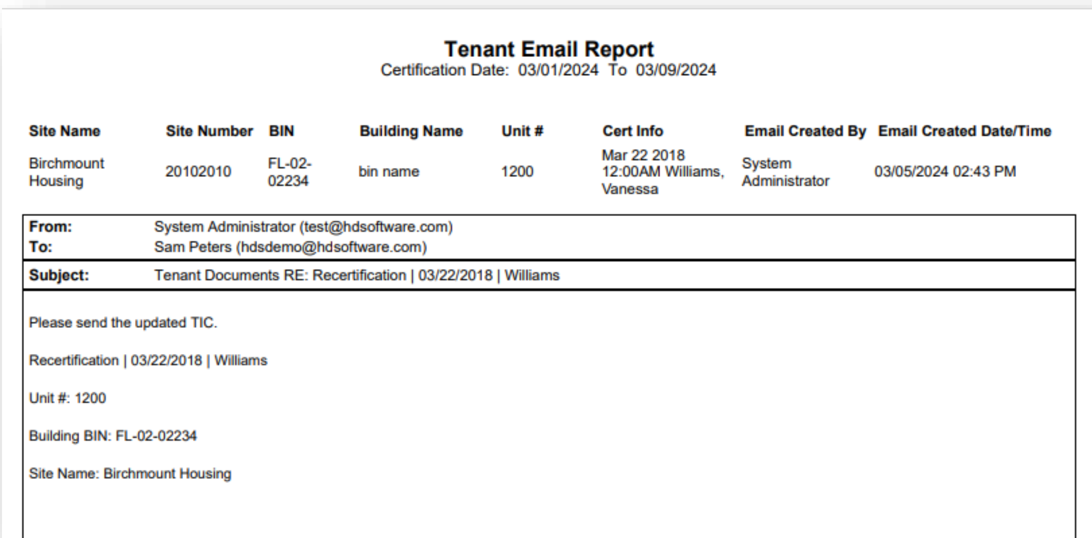
The report displays the *Site Name*, *BIN, Building Name, Unit Number, Cert Info, File Name, File Type, Uploaded By,* and *Time Stamp*.

**Tenant Email Report**

1. Click on *Email Report.*




2. Select the *Site, Building, Unit, Cert Date, Date Range*, and *System User*.
3. Then click *Run*.



**Tenant Email Report**

Certification Date: 03/01/2024 To 03/09/2024

| Site Name | Site Number | BIN | Building Name | Unit # | Cert Info | Email Created By | Email Created Date/Time |
|---|---|---|---|---|---|---|---|
| Birchmount Housing | 20102010 | FL-02-02234 | bin name | 1200 | Mar 22 2018 12:00AM Williams, Vanessa | System Administrator | 03/05/2024 02:43 PM |

**From:** System Administrator (test@hdsoftware.com)
**To:** Sam Peters (hdsdemo@hdsoftware.com)
**Subject:** Tenant Documents RE: Recertification | 03/22/2018 | Williams

Please send the updated TIC.

Recertification | 03/22/2018 | Williams

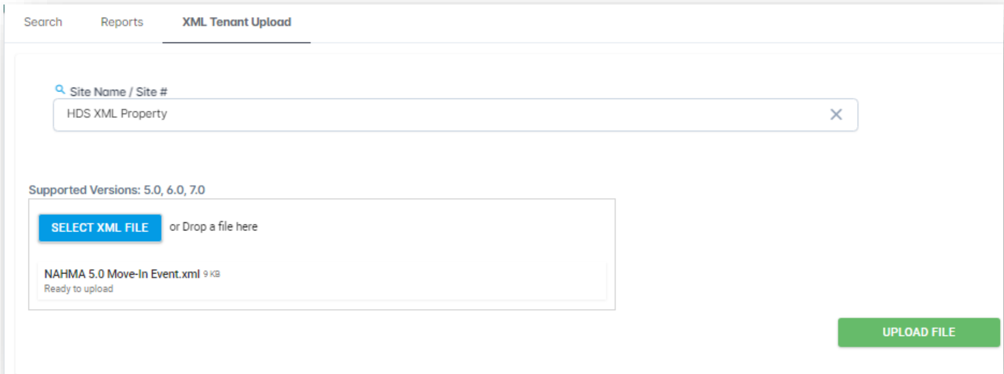
Unit #: 1200

Building BIN: FL-02-02234

Site Name: Birchmount Housing

The report displays the *Site Name, Site Number, Unit, Cert Info, BIN, Building Name, Unit Number, Uploaded By,* and *Time Stamp*.

# XML Upload




The XML upload functionality allows the uploading of tenant data seamlessly. The accepted file versions should be created using the NAHMA XML standard.

**To Upload a File:**

1. Select the Site Name from the Site Name/Site# drop down.
2. Click *Select XML File* to browse your directory. The file name will appear with a status of "*Ready to Upload.*" or drag and drop the file into the *Select XML File* box.
3. To process the file, click *Upload File*.