



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@hdssoftware.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.

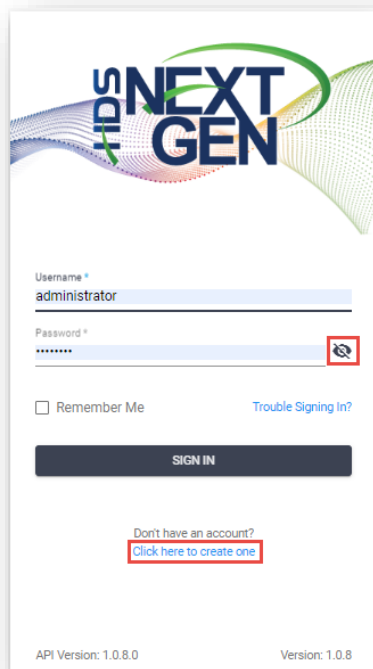
Points of Contact

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.



Username *

administrator

Password *

.....

Remember Me [Trouble Signing In?](#)

SIGN IN

Don't have an account?
[Click here to create one](#)

API Version: 1.0.8.0 Version: 1.0.8

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

Account Type*
Asset Management User, Compliance User

Already have an account? [Sign in here](#)

Registrant Information

First Name*
Jane

Last Name*
Doe

Email*
Jane.Doe@hdssoftware.com

Username*
JaneD1000

Password*

Confirm Password*

Organization Information

Name*
HDS

Organizational Role*
General Partner

Address*
1101 SW 10th St

City*
Miami

State*
Florida

Zip Code*
33351

Phone*
(305) 979-9999

Request Site Access

Actions	Site Name	Site Number
...	Birchmount Housing	201020102

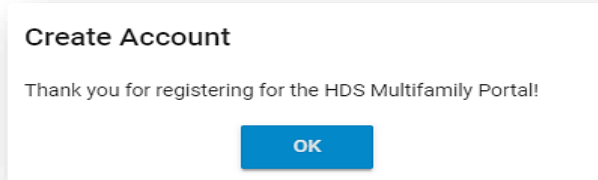
I agree to EULA terms and conditions. [View EULA](#) [Create Account](#)

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.

The image shows two sequential screenshots of the HDS NextGen login page. Both screenshots feature the 'HDS NEXT GEN' logo at the top. Below the logo are input fields for 'Username *' (containing 'HDS_User002') and 'Password *' (masked with dots). There are checkboxes for 'Remember Me' and a link for 'Trouble Signing In?'. A 'SIGN IN' button is located below these fields. At the bottom, there is a link for 'Don't have an account? Click here to create one' and a checkbox for 'I agree to EULA terms and conditions' with a 'View EULA' button. Screenshot 1 (labeled '1') shows the 'SIGN IN' button as disabled (grey) and the EULA checkbox as unchecked. Screenshot 2 (labeled '2') shows the 'SIGN IN' button as active (dark blue) and the EULA checkbox as checked. Red boxes highlight the 'SIGN IN' button and the EULA checkbox in both screenshots.

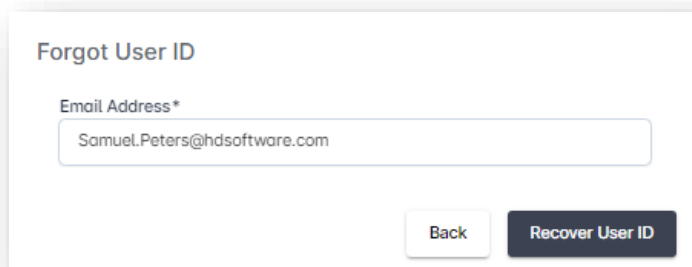
Forgot Password/Username

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

The image shows a 'Trouble Signing In' dialog box. It has a title 'Trouble Signing In' and two radio button options: 'I forgot my User ID' and 'I forgot or need to reset my password'. At the bottom of the dialog are two buttons: 'Back to Sign In' and 'OK'.

User ID

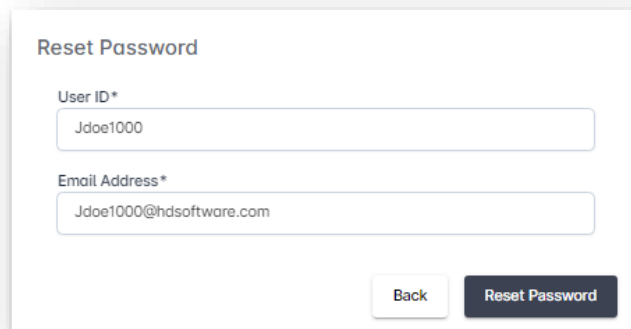
1. Click the *I forgot my User ID* option.
2. Enter the *Email Address* associated with the User ID.
3. Click *Recover User ID*.
4. The User ID will be sent to the email address of the registrant.



The screenshot shows a web form titled "Forgot User ID". It features a single text input field labeled "Email Address*" containing the email address "Samuel.Peters@hdssoftware.com". Below the input field are two buttons: a light gray "Back" button and a dark blue "Recover User ID" button.

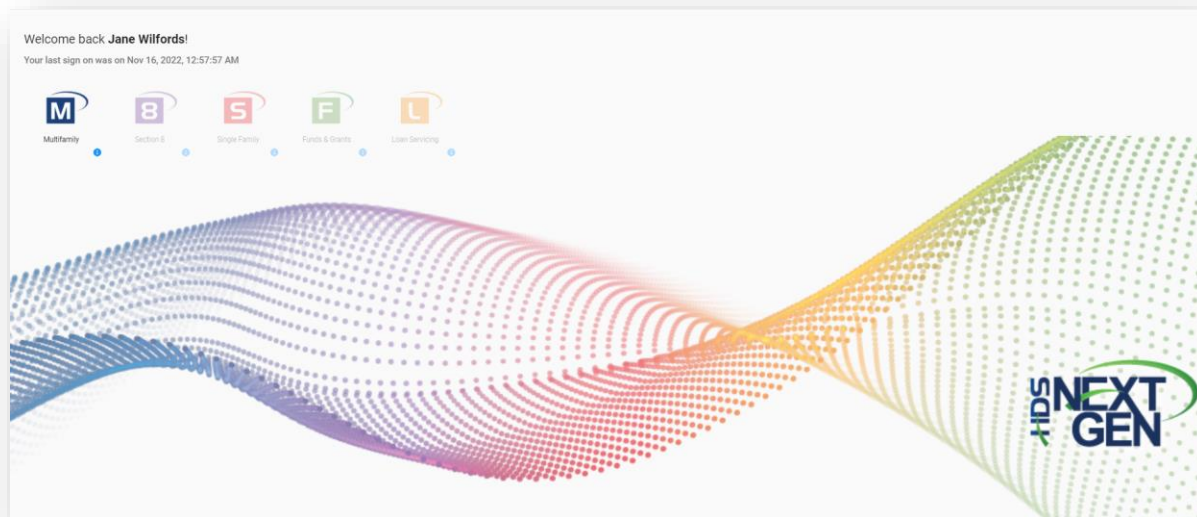
Forgot Password

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



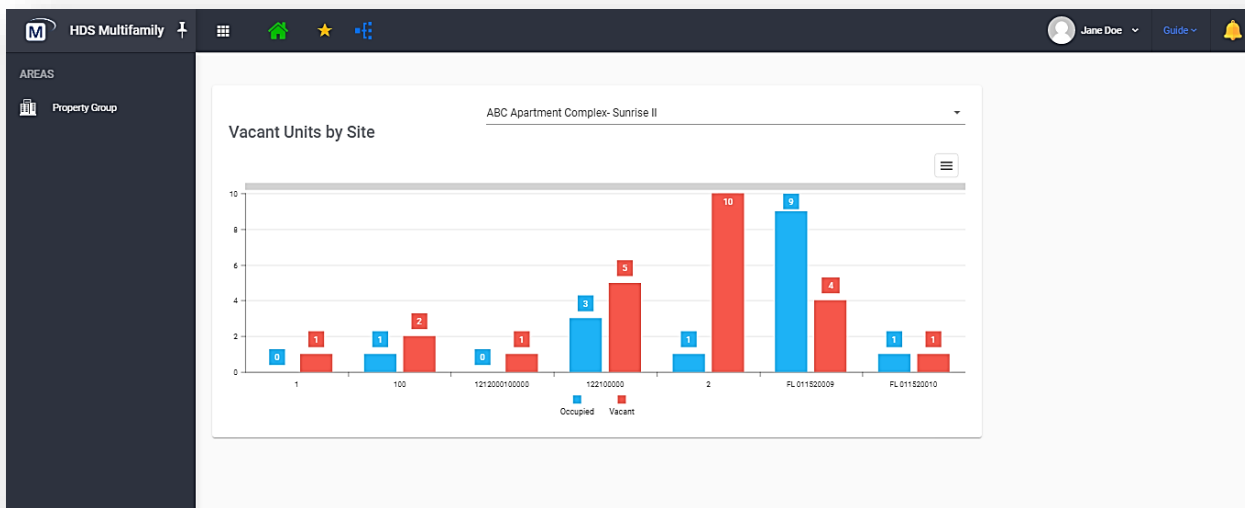
The screenshot shows a web form titled "Reset Password". It contains two text input fields. The first is labeled "User ID*" and contains "Jdoe1000". The second is labeled "Email Address*" and contains "Jdoe1000@hdssoftware.com". At the bottom of the form are two buttons: a light gray "Back" button and a dark blue "Reset Password" button.

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.

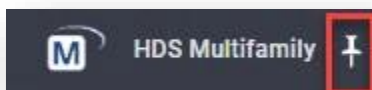



Navigation Tools


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.

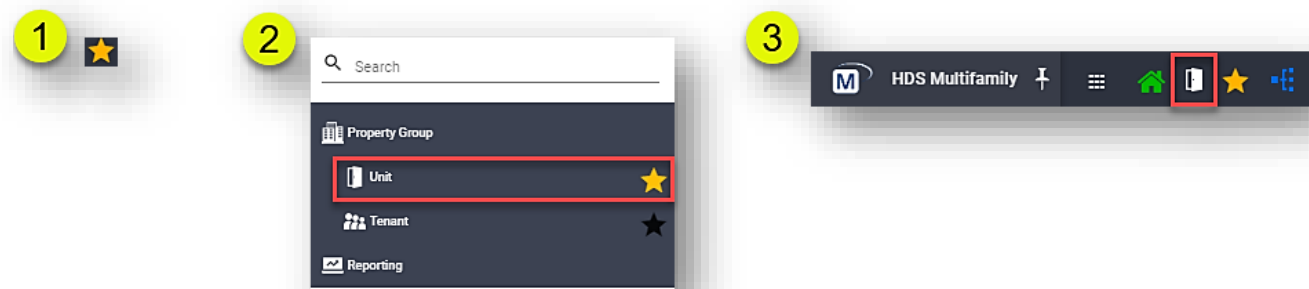
Toolbar Icons

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.




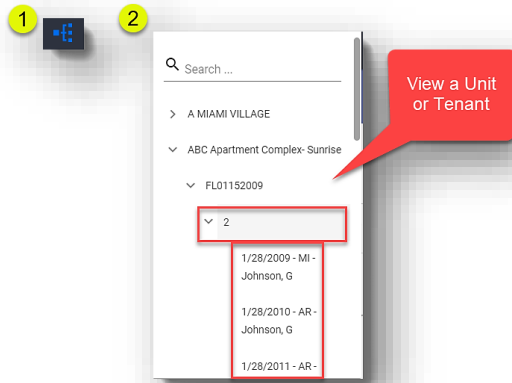
To return to the NextGen multi-product page, click . On this page, you can select a different NextGen program or view the date/time of your last sign on.

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.

Property Group Search

Search Criteria

UNIT Tenant

Get Date From: 11/04/2012 Get Date To: 11/10/2013

First Name: JANE Last Name: DOE

Program: H&D MF LHMC

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.

Profile Details Change Picture Save

About Alerts Settings

Registrant Information

First Name* Samuel

Last Name* Peters

Email* Samuel.Peters@housings.com

User Name* SPETERSDOS

Password* *****

Confirm Password* *****

Organization Information

Name* Samuel Peters

Organizational Role* Owner Contact

Address* 1101 SW 19th St

City* Miami

State* Florida Zip Code* 33132

Phone* (954)217-9597

Site Access

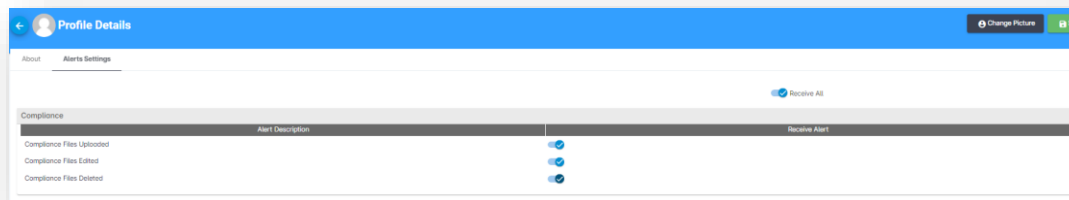
This area is read-only. In the Site Access area are the sites you've requested access or been assigned to by an agency team member. When you've completed your changes to the Profile Details, click *Save*.



Site Name	Site #
ABC Apartment Complex - Sunrise II	10-004
Birchmount Housing	201020102
City of Spring Dale	00014
Dallington Estates	00032
HDS Demo	HDS1145

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

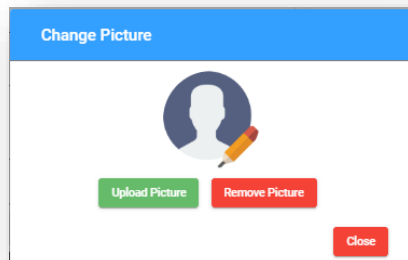
1. Choose the desired Alert.
2. Then check the *Receive Alert* box.
3. Click *Save* to complete your actions.

IMPORTANT NOTE

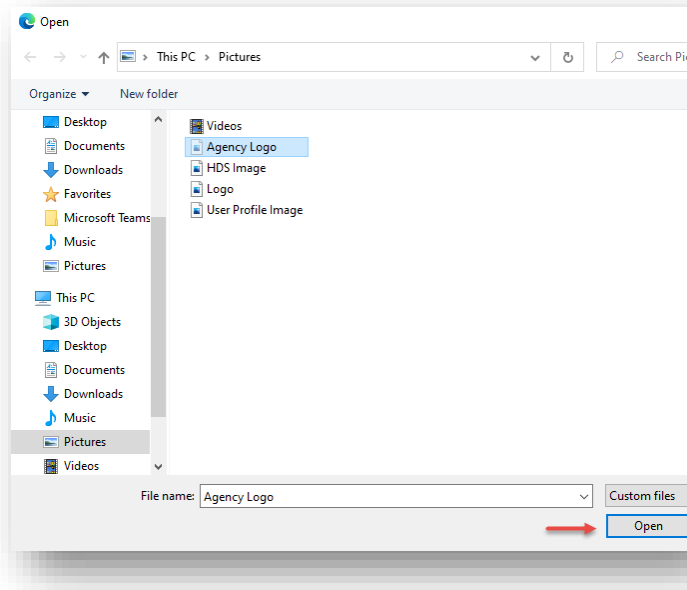
Users can select each individual alert or click *Receive All* to enable all alerts. Alert Notifications will be visible via the notification bell icon.

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*.



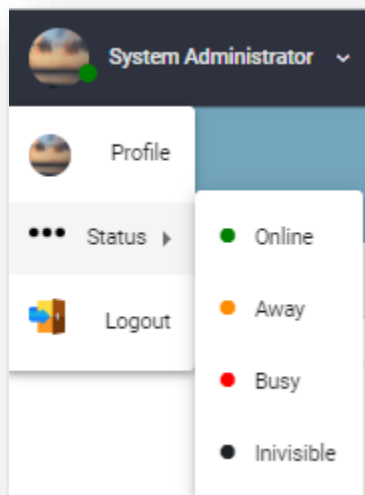
3. Choose the file you wish to upload from the selected directory and click *Open*.



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.

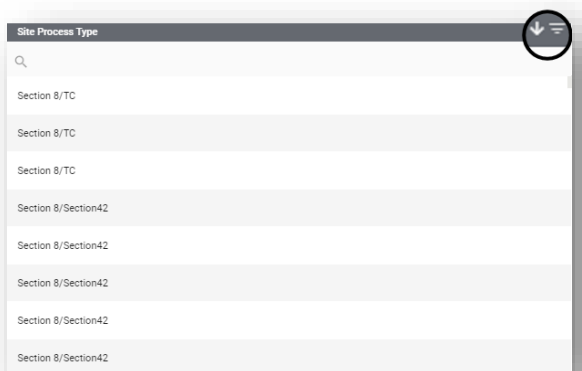
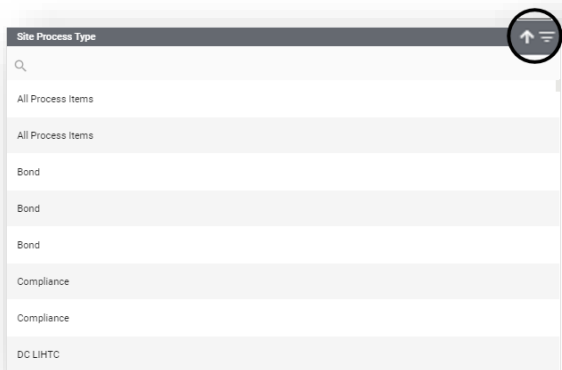
The quick search is located on the right-side of the grid. You can perform a keyword search with alphanumeric values. The system will retrieve relevant results in the row(s) below.

Actions	Site Name	Site Number	Unit Num.	LHFC Unit Nu.	Vacant	BIN	Site Process Ty.	Building Name	Archived	Inactive	Out of Service
Unable to load grid data.											
...	ABC Apartment Complex- Sunrise II	10-004	2	2	No	FL 011520009	State Tax Credits	Building 1	No	No	No
...	ABC Apartment Complex- Sunrise II	10-004	2-A	3	No	FL 011520009	State Tax Credits	Building 1	No	No	No
...	ABC Apartment Complex- Sunrise II	10-004	4	4	No	FL 011520009	State Tax Credits	Building 1	No	No	No
...	ABC Apartment Complex- Sunrise II	10-004	5	5	Yes	FL 011520009	State Tax Credits	Building 1	No	No	No
...	ABC Apartment Complex- Sunrise II	10-004	6	6	No	FL 011520009	State Tax Credits	Building 1	No	No	No
...	ABC Apartment Complex- Sunrise II	10-004	7	7	No	FL 011520009	State Tax Credits	Building 1	No	No	No
...	ABC Apartment Complex- Sunrise II	10-004	2		Yes	100	State Tax Credits	Test	No	No	No
...	ABC Apartment Complex- Sunrise II	10-004	3		Yes	100	State Tax Credits	Test	No	No	No

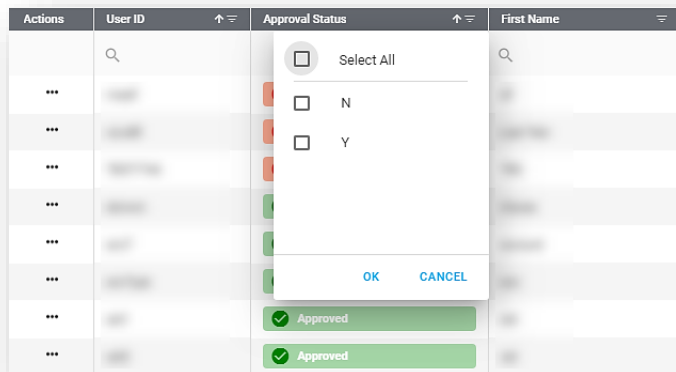
Keyword searches can also be performed from within the grid. Click the search icon to view filter options. The system can retrieve records that contain or start with keywords or characters. Select *Reset* to refresh the search.

Actions	Site Name	Site Number	Unit Count	Vacant Units	Archived	Inactive	Out-of-Service	Site Process Type
	<input type="text" value=""/>	<input type="text" value=""/>						<input type="text" value=""/>
		Aba1234	1	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LIHTC
	ABC11	0	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HOME/LIHTC
	lex-Sunrise II	10-004	26	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LIHTC
	1234	1	1	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HOME/LIHTC
	abcd	1213123	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bond
	abcde	123456-p	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bond
	Abcded	AAA123	1	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HOME/LIHTC
	AcqResRehab	1234567	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HOME/LIHTC

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.

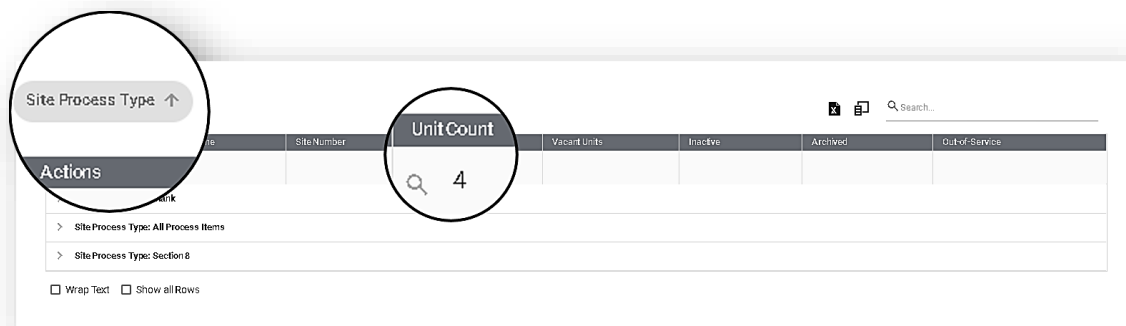




The **Funnel** is also used to filter information in individual columns of the grid. Select an option in the menu to view specific results or view all options by selecting *Select All*.

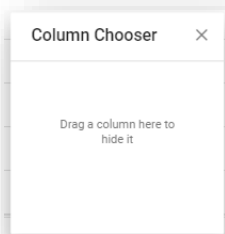


You can group data to customize the presentation of search results. Notice the text directing you to drag a column header to that area for grouping on the left side of the grid. Drag and drop a column to this area. In this example, the drag and drop function is illustrated with the *Site Process Type*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

Drag a column header here to group by that column

Actions	Site Name	Site Number	Unit Count	Vacant Units	Inactive	Archived	Out-of-Service	Site Process Type
	Zion Estates	00126	5	4	No	No	No	Multi Family Construction
	Zachary Estates	12002012	38	22	No	No	No	Section 8/Section42
	Wood Apartments	FL59E000025	0	0	No	No	No	Section 8
	Winter White Apartments	FL887766554	2	1	No	No	No	Section 8
	William House 0 Bedroom Size	TC1238	2	1	No	No	No	Multi Family Construction
	Wildwood Apartments	FL46R000039	18	0	No	No	No	Section 8
	Weston Gardens	22011001	1	0	No	No	No	HOME/LIHTC
	wednesday 22	07222020	0	0	No	No	No	Compliance


Page 1 of 37 (292 items)

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

Drag a column header here to group by that column

Actions	Site Name	Site Number	Address	Unit Count	Vacant Units	Inactive	Archived	Out-of-Service	Site Process Type
	Zion Estates	00126		5	4	No	No	No	Multi Family Construction
	Zachary Estates	12002012	45 NE 22nd Happy Lane	38	22	No	No	No	Section 8/Section42
	Wood Apartments	FL59E000025	123 MAIN ST	0	0	No	No	No	Section 8
	Winter White Apartments	FL887766554	123 main st	2	1	No	No	No	Section 8
	William House 0 Bedroom Size	TC1238	1101 SW0th st	2	1	No	No	No	Multi Family Construction
	Wildwood Apartments	FL46R000039	4073 Tower Street	18	0	No	No	No	Section 8
	Weston Gardens	22011001	33 NE 23th Court	1	0	No	No	No	HOME/LIHTC
	wednesday 22	07222020	202 6th Avenue South	0	0	No	No	No	Compliance

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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.

Drag a column header here to group by that column

Actions	Site Name	Site Number	Unit Count	Vacant Units	Inactive	Archived	Out-of-Service	Site Process Type
	Zion Estates	00126	5	4	No	No	No	Multi Family Construction
	Zachary Estates	12002012	38	22	No	No	No	Section 8/Section42
	Wood Apartments	FL59E000025	0	0	No	No	No	Section 8
	Winter White Apartments	FL887766554	2	1	No	No	No	Section 8
	William House 0 Bedroom Size	TC1238	2	1	No	No	No	Multi Family Construction
	Wildwood Apartments	FL46R000039	18	0	No	No	No	Section 8
	Weston Gardens	22011001	1	0	No	No	No	HOME/LIHTC
	wednesday 22	07222020	0	0	No	No	No	Compliance

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.

Drag a column header here to group by that column

Save Layout Reset Layout

Actions	Site Name	Site Number	Unit Count	Vacant Units	Inactive	Archived	Out-	Site Process Type
	Zion Estates	00126	5	4	No	No	No	Multi Family Construction
	Zachary Estates	12002012	38	22	No	No	No	Section 8/Section42
	Wood Apartments	FL59E000025	0	0	No	No	No	Section 8
	Winter White Apartments	FL887766554	2	1	No	No	No	Section 8
	William House O Bedroom Size	TC1238	2	1	No	No	No	Multi Family Construction
	Wildwood Apartments	FL46R000039	18	0	No	No	No	Section 8
	Weston Gardens	22011001	1	0	No	No	No	HOME/LIHTC
	wednesday 22	07222020	0	0	No	No	No	Compliance

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Wrap Text Show all Rows

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.

Actions	Site Name	Site Number	Unit Count	Vacant Units	Archived	Inactive	Out-of-Service	Site Process Type
	Beneficent House	12255	95	40	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Section 8
	Benette House Properties	10002142	5	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Section 8
	Beth Section 8 Property	CA1111111...	2	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Section 8
	Beth's 202D Property	CA898989...	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Section 42(LIHTC)
	BICENTENNIAL MANOR	KS4001560...	60	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Section 8
	BIG MANOR	FL9LM000...	35	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Section 8
	BigDay	010620210...	1	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Section 8/Section42
	BIRCH APARTMENTS	KS4000100...	17	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Section 8/Section42
	Birchmount Housing	20102010	19	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HOME
	BLUEJACKET LODGE APARTMENTS	KS1600030...	52	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Section 8
	Bradenton Beach	10002012	1	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Section 8
	BROOKLYN	FL06L0000...	57	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Section 8




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12 20

Wrap Text Show all Rows

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*.

Add Unit

Site *
ABC Apartment C... X

Building Number *
1 X

Create Single Unit
 Create Multiple Units

Unit Number *
400

Bedroom Size *
125

Multifamily Unit

Square Footage *
955

Unit Type (MF) *
2 bedrooms X

LIHTC Unit Number *
100

Save Cancel

View of Add Unit for Multifamily only

Add Unit

Site *
Battery Park Apart... X

Building Number *
1 X

Create Single Unit
 Create Multiple Units

Unit Number *
400

Bedroom Size *
125

Multifamily Unit

Square Footage *
955

Unit Type (MF) *
2 bedrooms X

LIHTC Unit Number *
100

Section 8 Unit

Contract Number *
FL547852220

Unit Type (S8) *
1 Bedroom A

TRACS Unit Number *
101

Save Cancel

View of Add Unit with Section 8

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*.

Copy Unit

Site*
Birchmount Housing - 201020102

Building Number*
FL-03-03234

Unit Number*
101

Bedroom Size*
3

Unit Type (MF) *
1 bedroom

Square Footage*
5000

Copy Cancel

4. Click *Copy* to complete your actions.

Add Unit

Site*
Birchmount Housing - 2010... Copy Unit

Building Number*
FL-02-02234

Create Single Unit
 Create Multiple Units

Unit Number*
101

Bedroom Size*
2

Multifamily Unit
Square Footage*
3000

Unit Type (MF) *
2 bedrooms

MF Program Unit Number*
101

Save Cancel

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*.

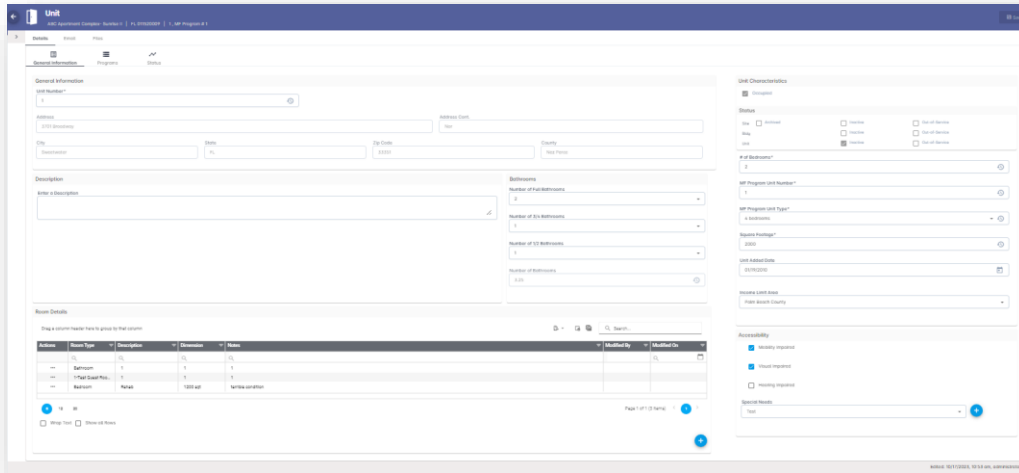
The screenshot shows the 'Unit Search' interface. It features a search bar at the top with a magnifying glass icon and a 'Clear' button. Below the search bar are several input fields for search criteria: Unit Number, Site Name, BIN, MF Program Unit Number, TRACS Unit Number, Building Name, Site Number, Site Process Type (a dropdown menu), and Site Programs (a dropdown menu). There are also three checkboxes at the bottom: 'Display Archived Sites', 'Display Inactive Units', and 'Display Out-of-Service Units'. An 'Advanced Search' button with a dropdown arrow and a 'Clear' button are also visible.

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

The screenshot shows the 'Unit Search' grid. The table has the following columns: Actions, Unit Number, MF Program Unit Number, TRACS Unit Number, Vacant, BIN, Building Name, Site Number, Site Name, Site Process Type, Archived, Inactive, and Out-of-Service. The table contains 8 rows of data. The first row is highlighted in blue. The 'Edit' button in the Actions column of the first row is highlighted with a white box. The page number 'Page 1 of 1 (8 items)' is displayed at the bottom right.

Actions	Unit Number	MF Program Unit Number	TRACS Unit Number	Vacant	BIN	Building Name	Site Number	Site Name	Site Process Type	Archived	Inactive	Out-of-Service
...	2	2		No	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	HOME/LH/TC	No	No	No
...	3	3		Yes	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	HOME/LH/TC	No	No	No
...	7	7		No	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	HOME/LH/TC	No	No	No
...	8	8		No	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	HOME/LH/TC	No	No	No
...	9	9		No	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	HOME/LH/TC	No	No	No
...	10	10		No	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	HOME/LH/TC	No	No	No
...	100	1234		Yes	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	HOME/LH/TC	No	No	No
...	10000	455		No	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	HOME/LH/TC	No	No	No

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



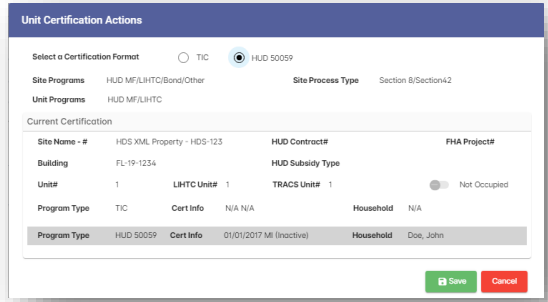
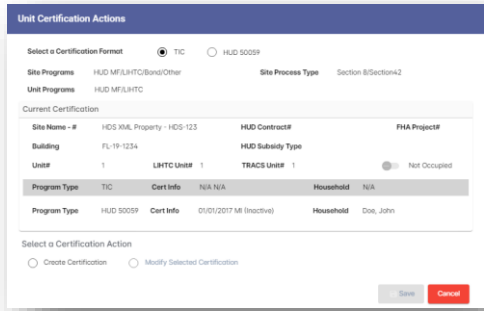
Also, from the *Actions* column users can create *New* or *Modify* an existing clicking *Cert Actions*.

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.

Actions	Unit Number	LIHTC Unit Number	TRACS Unit Number	Vacant	SN	Building Name	Site Number	Site Name	Site Process Type	Archived	Inactive	Out of Service
---	5	5		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex - Sunrise II	All Process Nam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	7	7		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex - Sunrise II	All Process Nam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	8	8		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex - Sunrise II	All Process Nam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20	9	9		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex - Sunrise II	All Process Nam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14A	14A			<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex - Sunrise II	All Process Nam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	1			<input checked="" type="checkbox"/>	120100000	Building 11 - Old Bldg	10-004	ABC Apartment Complex - Sunrise II	All Process Nam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	2			<input type="checkbox"/>	120100000	Building 11 - Old Bldg	10-004	ABC Apartment Complex - Sunrise II	All Process Nam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Text				<input checked="" type="checkbox"/>	Z	Text	10-004	ABC Apartment Complex - Sunrise II	All Process Nam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Certification Actions

Certification Format: TIC

Site Program: LIHTC Site Process Type: MF Developers

Unit Program: LIHTC

Current Certification

Site Name - #: XML Test 1 W0 47180 - 47180

Building: XT1 147180

Unit#: 1 MF Prog. Unit#: 1 Occupied

Cert Program: LIHTC Cert Info: 01/01/2017 MI (Submitted)

Household: Doe, John

Select a Certification Action

Create Certification Modify Current Certification

Create Certification

Certification Type: IC AR IR UT MO

Effective Date: 04/17/2023

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.

Actions	Unit Number	LIHTC Unit Number	TRACS Unit Number	Vacant	EBL	Building Name	Site Number	Site Name	Site Process Type	Archived	Inactive	Out of Service
...	5	5		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edt	7	7		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	8	8		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	20	9		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cert Actions	144	144		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	1	1		<input checked="" type="checkbox"/>	122100000	Building 11 - Old Bn	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	2	2		<input type="checkbox"/>	122100000	Building 11 - Old Bn	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	Test553	LIHTC 555		<input checked="" type="checkbox"/>	2	Test	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 Certification Actions

Certification Format TIC

Site Program LIHTC Site Process Type Section 42

Unit Program LIHTC

Current Certification

Site Name - # Birchmount Housing - 201020102

Building FL-02-02234

Unit# 1400 LIHTC Unit# 1400 Occupied

Program Type TIC Cert Info 09/11/2013 AR (Submitted) Household Jones, Sam

Select a Certification Action

Create Certification Modify Selected Certification

Modify Selected Certification

Current Certification 09/11/2013 AR

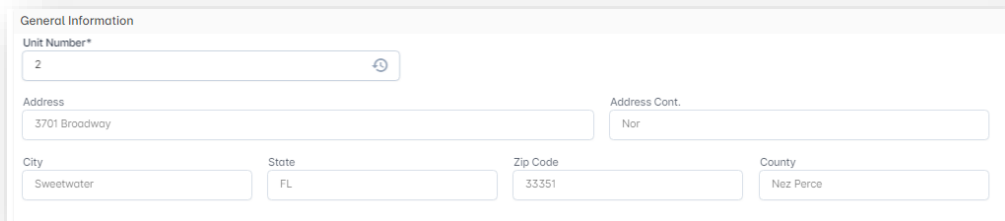
Available Action(s) Correct Unsubmit Delete

Cancel

Unit

General Information

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



General Information

Unit Number*
2

Address
3701 Broadway

Address Cont.
Nor

City
Sweetwater

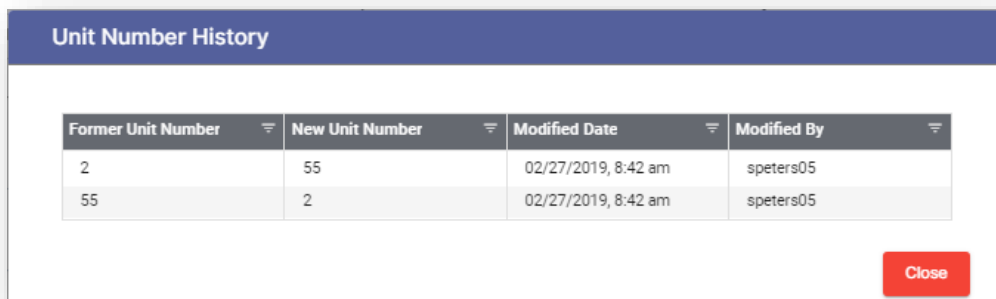
State
FL

Zip Code
33351

County
Nez Perce

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.

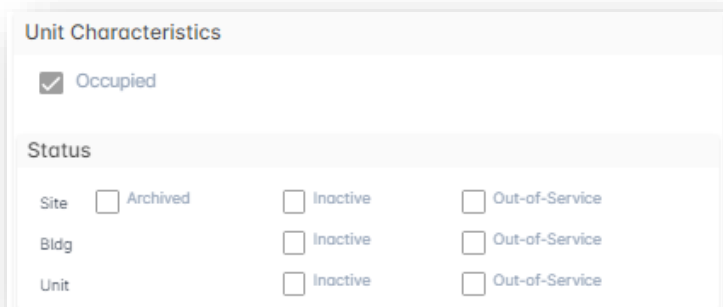


Former Unit Number	New Unit Number	Modified Date	Modified By
2	55	02/27/2019, 8:42 am	speters05
55	2	02/27/2019, 8:42 am	speters05

Close

Unit Characteristics

This section displays the status of the Unit.



Unit Characteristics

Occupied

Status

Site Archived Inactive Out-of-Service

Bldg Inactive Out-of-Service

Unit Inactive Out-of-Service

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*
2

MF Program Unit Number*
2

MF Program Unit Type*
3 bedrooms

Square Footage*
1000

Unit Added Date
01/15/2010

Income Limit Area
Jackson County

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.

Accessibility

Mobility Impaired

Visual Impaired

Hearing Impaired

Special Needs
Wheelchair Ramp

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.

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.

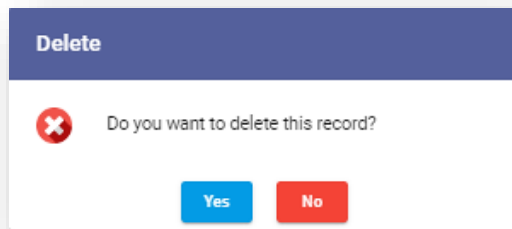
Actions	Room Type	Description	Dimension	Notes	Modified By	Modified On
...	Family Room	Wood Floor	1000	Good Condition	speters05	07/30/2024, 3:30 pm

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.

 A screenshot of a web application interface showing the "LIHTC" configuration form. The form has a navigation bar at the top with tabs for "General Information", "Amenities", "Programs", and "Status". Under the "Programs" tab, there are sub-tabs for "LIHTC", "HOME", "HTF", and "BOND". The "LIHTC" sub-tab is active. The form contains the following fields:

- "Square Footage*" with a text input field containing the value "1000".
- "MF Program Unit Number" with a text input field containing the value "2" and a refresh icon to its right.
- Two checkboxes:
 - Do not Count In Compliance Testing (Not a residential Unit)
 - Unit has Removed Status (Income Averaging)

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.

Unit Designation

Drag a column header here to group by that column

Actions	Unit Designation	Effective Date	Change Reason	Comment	Modified By	Modified On
No data						

Page 1 of 1 (0 items)

Wrap Text Show all Rows

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

Add Unit Designation

Unit Designation *
50% Band

Effective Date *
04/10/2023

Change Reason *
Federally (IRS) Permitted Chan...

Comment

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.

Set-Aside Group

Drag a column header here to group by that column

Search...

Actions	Group Member	Effective Date	Comment	Modified By	Modified On
No data					

Page 1 of 1 (0 items)

Wrap Text Show all Rows

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

Add Set-Aside Group

Group Member * Effective Date *

Yes 04/04/2023

Comment

3. Click *Save* to complete your actions.

Application Fraction Group

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

Applicable Fraction Group

Drag a column header here to group by that column

Search...

Actions	Group Member	Effective Date	Comment	Modified By	Modified On
No data					

Page 1 of 1 (0 items)

Wrap Text Show all Rows

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

Add Applicable Fraction Group

Group Member * Effective Date *

Yes 04/10/2023 📅

Comment ✍️

Save
Cancel

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.

LIHTC
HOME
HTF
Band

HOME Unit

Normal

Group Home

SRO

Sanitary and Food Prep

Not Both Sanitary and Food Prep

Unit Status

Occupied

Vacant

Square Range: 1 Current Rent: N/A Current Income: N/A

Unit

Flat

Floor

Group ID

Income Limit Area History - Unit Level

Income Limit Area: 7/01/2020 Browse

Current HUD Approved Income Limits

Effective Date	Family Size	% AMI	Limit	Area
07/01/2020	1	20	\$11,100	Broward
07/01/2020	1	30	\$16,650	Broward
07/01/2019	1	40	\$22,200	Broward
07/01/2019	1	50	\$27,750	Broward
07/01/2019	1	60	\$33,300	Broward
07/01/2018	2	20	\$12,700	Broward
07/01/2018	2	30	\$19,050	Broward
07/01/2017	2	40	\$25,400	Broward
07/01/2017	2	50	\$31,750	Broward

Show All Rows

Current PJ Approved Income Limits

Effective Date	Family Size	% AMI	Limit	Area
07/01/2019	1	20	\$10,000	Broward
07/01/2019	1	30	\$15,000	Broward
07/01/2019	2	20	\$8,000	Broward
10/01/2020	2	20	\$200	Broward
10/01/2020	1	30	\$200,000	Broward
10/01/2020	2	30	2000	Broward

Show All Rows

Current HUD Approved Rent Limits

Effective Date	Unit Size	Type	Rent	Area
07/01/2020	1	Low	\$600	Broward
07/01/2020	1	High	\$1,040	Broward
06/28/2019	1	Low	\$700	Broward
06/28/2019	1	High	\$1,020	Broward

Show All Rows

Current PJ Approved Rent Limits

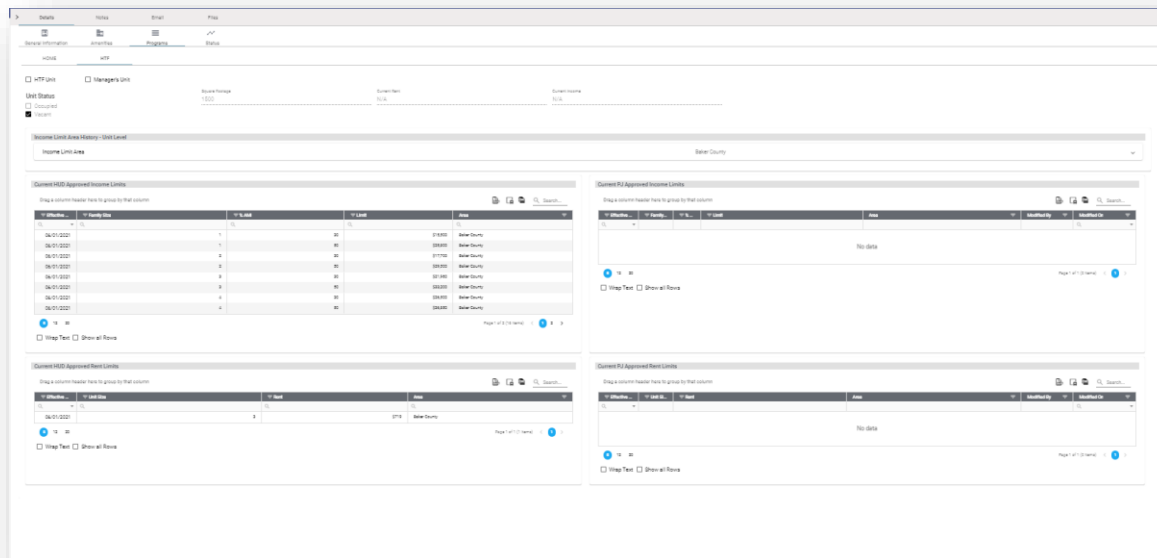
Effective Date	Unit Size	Type	Rent	Area
10/01/2020	0	Market	\$600	Broward
10/06/2020	1	Market	\$2,700	Broward
10/02/2020	0	Market	\$1,600	Broward
10/01/2020	20	Low	\$100,000,000	Broward
04/01/2019	800	Market	\$2,800	Broward
10/01/2020	0	Low	\$800,000,000	Broward

Show All Rows

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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.

Actions	Status	Effective Date	Reason	Modified By	Modified Date
...	Inactive	03/01/2024	Foreclosed	speters05	07/30/2024 05:10 PM

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.

Actions	Status	Effective Date	Reason	Modified By	Modified Date
...	Out of Service	04/01/2024	Under Investigation	speters05	07/30/2024, 5:25 pm

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.

Timestamp	Created By	Note Text
8/12/2020 4:19 PM	System Administrator	No w/ Site Name: ABC Apartment Complex- Sunrise II
8/12/2020 4:20 PM	System Administrator	Wells Fargo needs to update billing information Site Name: ABC Apartment Complex- Sunrise II
8/12/2020 4:20 PM	System Administrator	Dore Dew is no longer property owner at this address: 100 Sunny lake drive Site Name: ABC Apartment Complex- Sunrise II
8/12/2020 4:21 PM	System Administrator	I have made building 101 inactive due to hurricane repairs Site Name: ABC Apartment Complex- Sunrise II

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*.

New Note

Subject*

Updated Unit Number

B I U " " </> H1 H2 x₂ x² ¶ Normal Normal A Sans Serif

Requested Unit Number from Site Manager|

Save Close

3. Click *Save* to complete your actions.

To update a Note:

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

View Note

Subject*

Updated Unit Number #102

B I U " " </> H1 H2 x₂ x² ¶ Normal Normal A Sans Serif

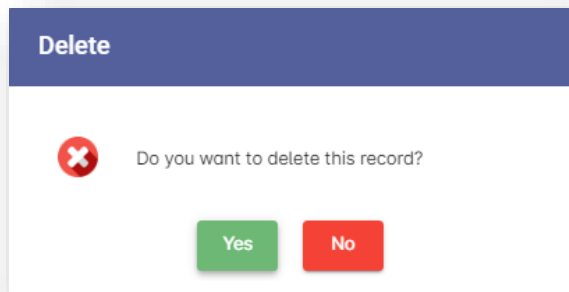
Requested Unit Number from Site Manager.

Delete Save Close

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

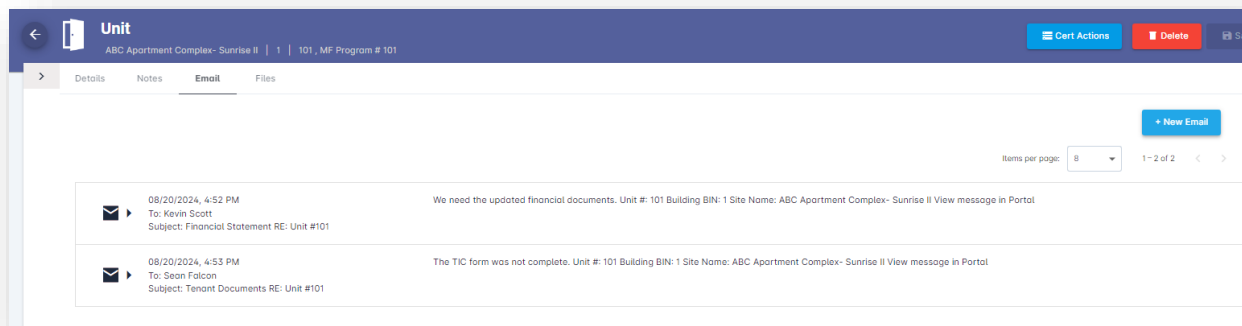
Email is used to communicate information to internal and external users. This feature is offered at the Unit and Tenant levels. The contacts list is linked to the email feature so you can select an email address for outgoing messages. You can only access your email messages in the Unit or Tenant record 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:

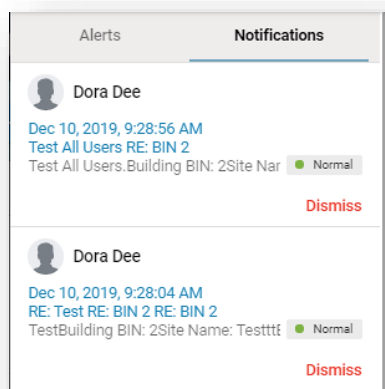
1. Click *New Email*.
2. Begin typing the recipient's name and select the correct contact when it is displayed.

 A "New Email" form with a blue header. The "From" field contains "test@hdsoftware.com". The "To" field shows a search result for "Kevin Scott (hdsdemo@hdsoftware.com)". Below the "To" field is a search bar with the text "Search for contacts or Email Group" and a "cc" checkbox. The "Subject*" field contains "Financial Statement". Below the subject field is a rich text editor with various formatting options (bold, italic, underline, link, unlink, list, list, link, unlink, link, unlink, link, unlink) and a font dropdown set to "Sans Serif". The text area contains "We need the updated financial documents|". At the bottom left is a "Save as Note" checkbox. At the bottom right are three buttons: "Save Draft" (green), "Send" (green), and "Close" (red).

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*.

New directory

HDS Directory

CREATE CANCEL

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

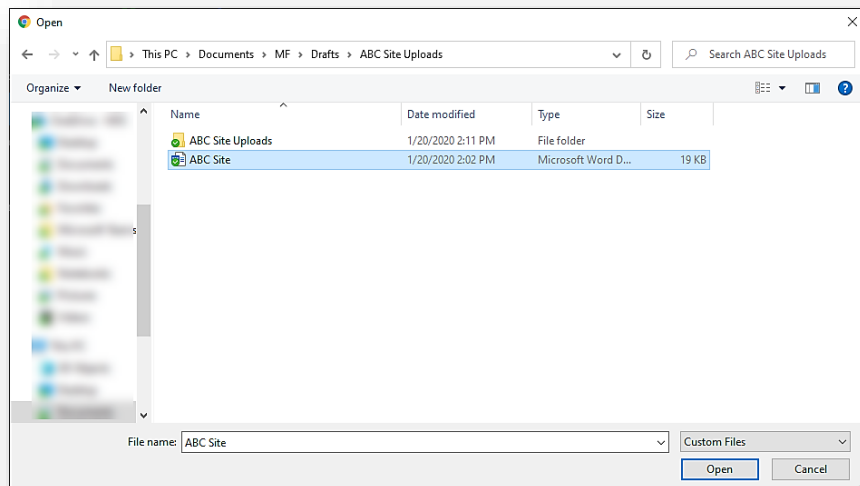
File Name	File Type	Uploaded By	Uploaded On	File Size
HDS Directory		administrator	2/13/2024	

Adding a File to a Directory

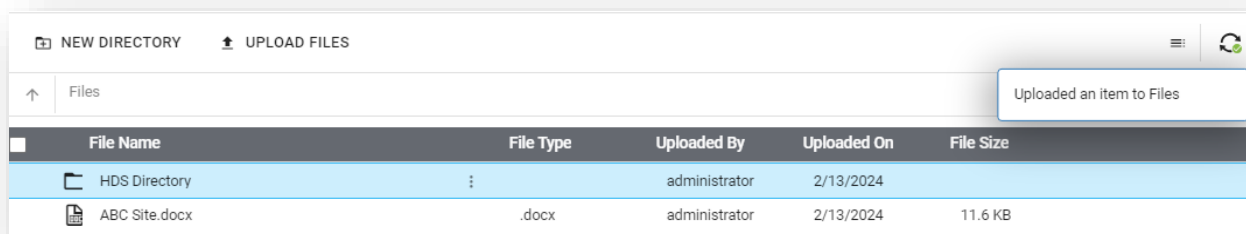
1. Click on *Upload Files*.

File Name	File Type	Uploaded By	Uploaded On	File Size
HDS Directory		administrator	2/13/2024	

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*.

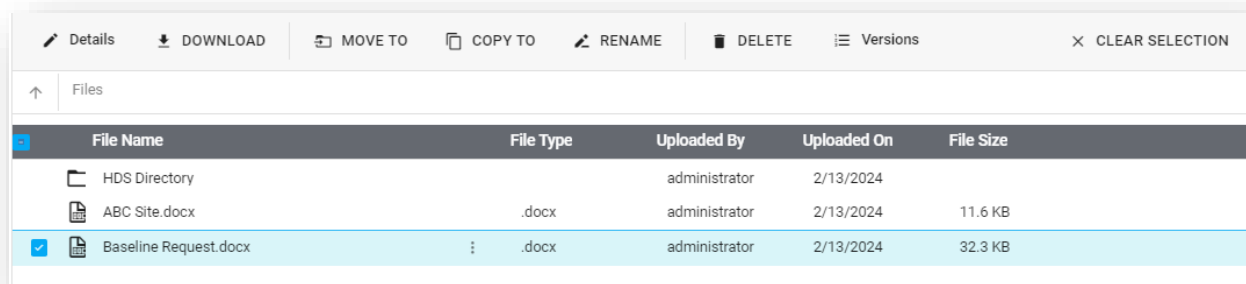


3. Click *Open*.

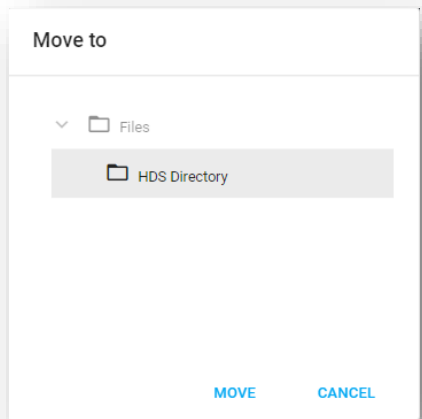


Add Existing File to Directory

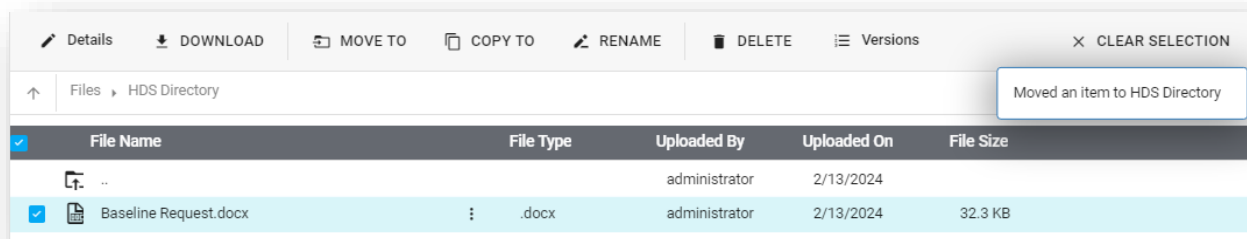
1. Click *Move TO*.



2. Highlight the document.

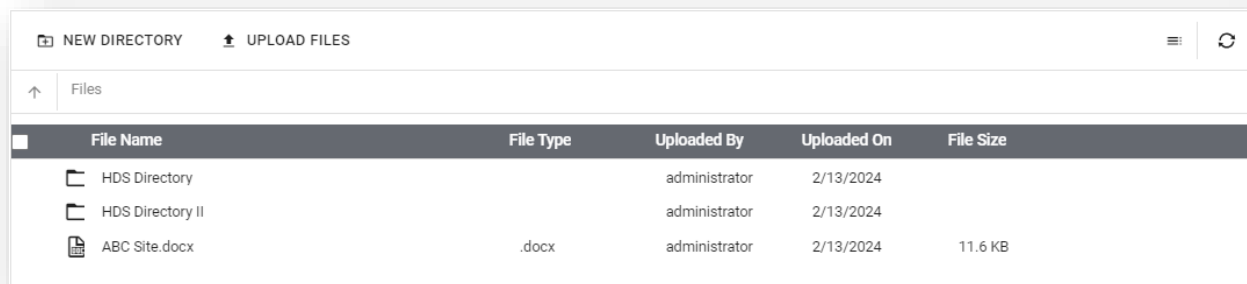


3. Select the *Directory*.
4. Then click *Move*. The system will display a message *Moved an Item to (Name Of Directory)*.

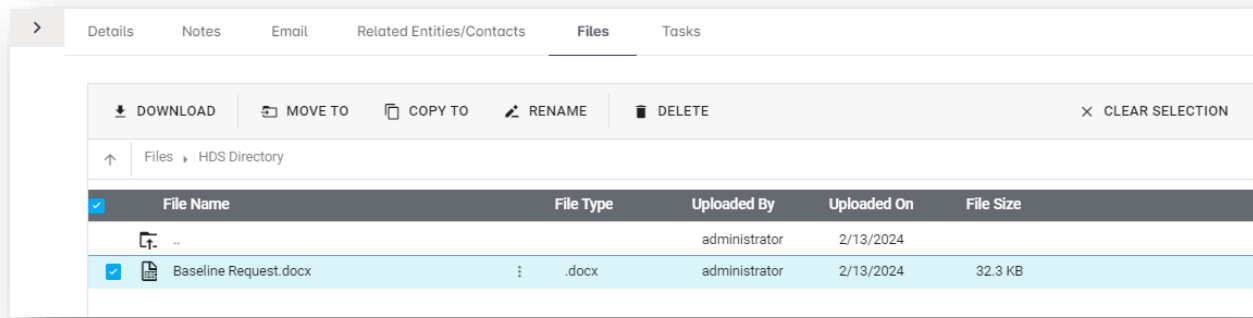


Copy File to New Directory

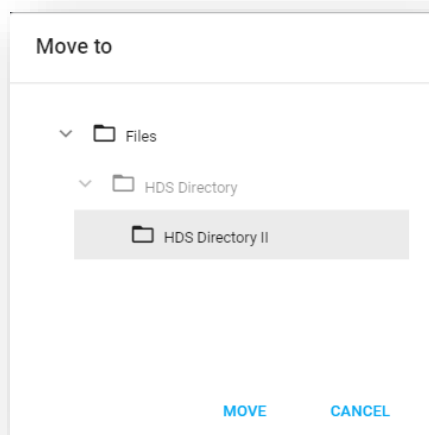
1. Select the *Directory* or *File*.



2. Highlight the file.

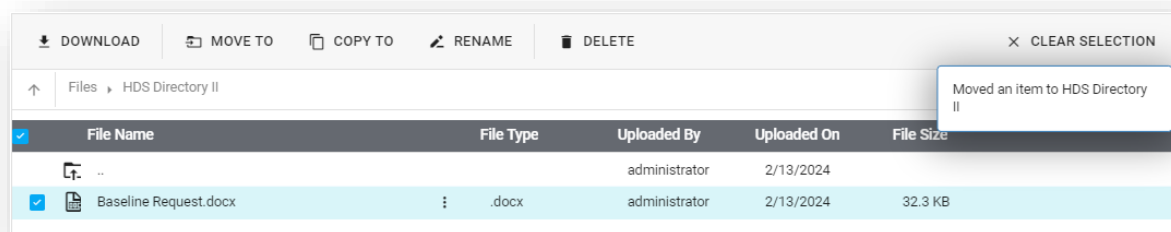


3. Then click on *Move To*.



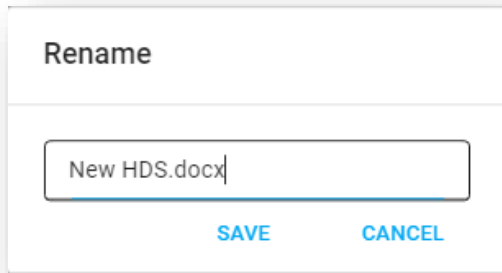
4. Select the *Directory*.

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



Update File Name

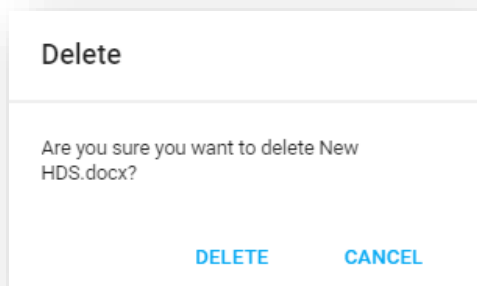
1. Highlight the file and click *Rename*.



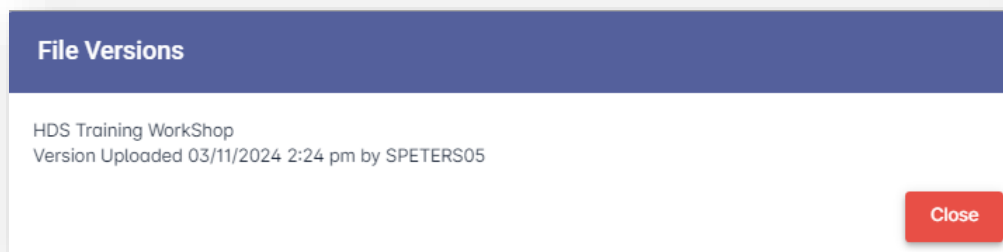
2. Enter the new document name and include file extension.
3. Then click *Save*.

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*.

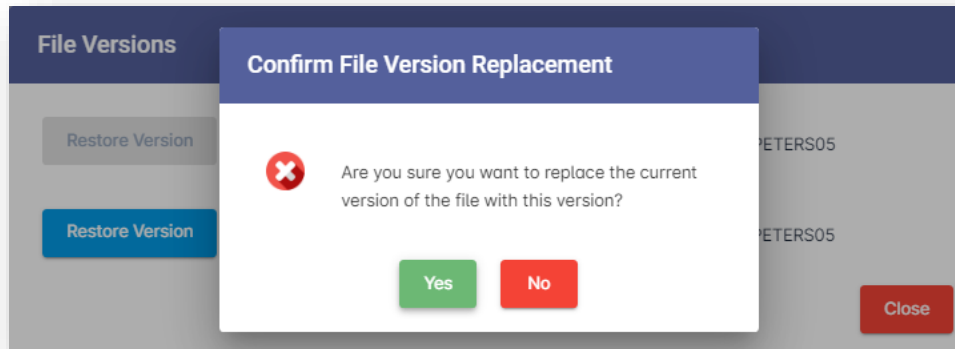
**Updating File Version:**

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

3. Click on *Versions*.

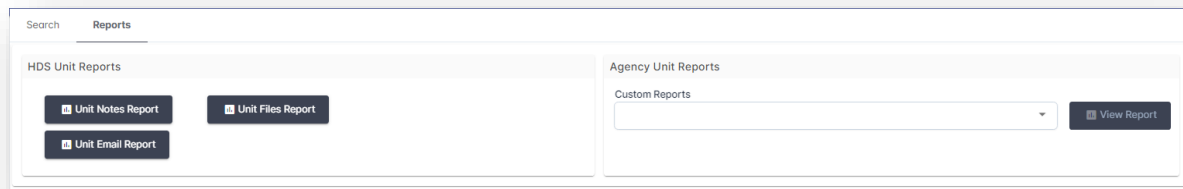


4. Click the *Restore Version* button.
5. From the *Confirm File Version Replacement* box click “Yes” to replace the current version of the file.



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*.

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@hdssoftware.com)						
To: System Administrator (test@hdssoftware.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*.

Unit Files Report

Site Selection*

Building Selection*

Unit Selection*

Uploaded Date Range

Uploaded By

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.

Search Reports XML Tenant Upload

Drag a column header here to group by that column

Search...

Actions	First Name	Last Name	Program	Cert Date	Cert Type	Is Correction	Unit Number	MF Program Unit Number	TRACS Unit Number	MF Unit Type	SS Unit Type	BIN	Building Name	Site Number	Site Name
...	Venessa	Williams	LIHTC	12/09/2023	MO	No	102			1 bedroom		FL-02-02...		201020102	Birchmou
Edit		Williams	LIHTC	12/08/2023	UTI	No	102			1 bedroom		FL-02-02...		201020102	Birchmou
Cert Actions		Williams	LIHTC	12/08/2023	UT-O	No	1200	1200		2 bedrooms		FL-01-01...		201020102	Birchmou
		Williams	LIHTC	12/07/2023	IR	No	1200	1200		2 bedrooms		FL-01-01...		201020102	Birchmou

8 12 20 Page 1 of 1 (4 items)

Wrap Text Show all Rows

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.

Add Certification

Site

Building Number

Unit Number

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.

Actions	Unit Number	LIHTC Unit Number	TRACS Unit Number	Vacant	Bin	Building Name	Site Number	Site Name	Site Process Type	Archived	Inactive	Out of Service
---	5	5		<input type="checkbox"/>	FL 011520209	Building 1	10-004	ABC Apartment Complex-Surprise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
---	7	7		<input type="checkbox"/>	FL 011520209	Building 1	10-004	ABC Apartment Complex-Surprise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edt	8	8		<input type="checkbox"/>	FL 011520209	Building 1	10-004	ABC Apartment Complex-Surprise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
---	20	9		<input type="checkbox"/>	FL 011520209	Building 1	10-004	ABC Apartment Complex-Surprise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cert Actions	1-A	1-A		<input type="checkbox"/>	FL 011520209	Building 1	10-004	ABC Apartment Complex-Surprise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
---	1	1		<input checked="" type="checkbox"/>	122100000	Building 11 - Old Bin	10-004	ABC Apartment Complex-Surprise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
---	2	2		<input type="checkbox"/>	122100000	Building 11 - Old Bin	10-004	ABC Apartment Complex-Surprise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
---	Text5553	LIHTC 555		<input checked="" type="checkbox"/>	2	Test	10-004	ABC Apartment Complex-Surprise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

Actions	Unit Number	LIHTC Unit Number	TRACS Unit Number	Vacant	IBN	Building Name	Site Number	Site Name	Site Process Type	Archived	Inactive	Out of Service
...	5	5		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	7	7		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	8	8		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	20	9		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	11A	1A		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	1	1		<input checked="" type="checkbox"/>	122100000	Building 11 - Old Bin	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	2	2		<input type="checkbox"/>	122100000	Building 11 - Old Bin	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	Test5553	LIHTC 555		<input checked="" type="checkbox"/>	2	Test	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

Certification Actions

Certification Format TIC

Site Program LIHTC **Site Process Type** MF Developers

Unit Program LIHTC

Current Certification

Site Name - # XML Test 1 WO 47180 -

Building XT147180

Unit# 1 **MF Prog. Unit#** 1 Occupied

Cert Program LIHTC **Cert Info** 01/01/2017 MI (Submitted)

Household Doe, John

Select a Certification Action

Create Certification Modify Current Certification

Save
Cancel

To make corrections to a certification:

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

Actions	Unit Number	LIHTC Unit Number	TRACS Unit Number	Vacant	SIN	Building Name	Site Number	Site Name	Site Process Type	Archived	Inactive	Out of Service
...	5	5		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	7	7		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	8	8		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cert Actions	20	9		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	1.A.	1.A.		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	1	1		<input checked="" type="checkbox"/>	122100000	Building 11 - Old Bin	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	2	2		<input type="checkbox"/>	122100000	Building 11 - Old Bin	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	Test553	LIHTC 553		<input checked="" type="checkbox"/>	2	Test	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

Asset	Member	Income Source	Amount	Created By	Created On
None	Judy Smith	None	\$23,000.00	ADMIN	07/26/2024 11:46 AM

“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 individual 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 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*.

The screenshot displays the 'Certification' page for a household. The page is divided into several sections:

- Programs:** A table listing programs such as Tax Credit, HOME, and Other, with columns for HSD Code, Tax Credit, HOME, and Other, and an Income Status column.
- Household:** Fields for Household Members (1), Household Type (Single-Person Household), Move-In Date (03/01/2019), Number of Bedrooms (2), Dependents Under 18 (0), and Full-Time Students (0).
- Income, Rent and Designations:** A table showing various income and rent values. The 'Most Restrictive Income Designation' is 65% AMI. The 'Most Restrictive Rent Designation' is 65% AMI. Other values include Personal Income Limit (\$0.00), Income Averaging (\$0.00), Personal Income Limit (\$32,353.00), Most Restrictive Income Limit (\$38,820.00), Total Income From All Sources (\$26,156.94), Personal Max Rent (\$0.00), Most Restrictive Max Rent (\$0.00), Gross Rent (\$679.92), Tenant Paid Rent (\$292.55), Utility Allowance (\$79.75), and Non-Optional Charges (\$47.55).

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

Member(s) List
New member | Head of Household | 05/30/2000

New member's Details

First Name * John Middle Name Last Name * Doe

Relationship * Head of Household Last 4 SSN * 6633 Alien Reg. Number

Races * African American / Black Birth Date * 05/30/2000 Marital Status Married

Ethnicity Missing Gender * Male Special Status Aids/HIV Related Illness

Disabled Missing LIHTC Student Occupation *

Source of Income * Business HOME Student Use Code Disabled HOME FT or PT Student Type Full-time Student

HOME Attending Institute of Higher Learning Yes

Add to Member List Cancel

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**.

New member's Details

First Name * Jane Middle Name Last Name * Doe

Relationship * Head of Household Last 4 SSN * 5555 Alien Reg. Number

Races * African American / Black Birth Date * 04/14/1991 Marital Status

Ethnicity Cuban, Hispanic or Latino Gender * Female Special Status Assisted Living

Disabled Tenant Declined to Respond LIHTC Student Yes Occupation * Architecture, Engineering

Source of Income * Business HOME Student Use Code Married/Joint Return HOME FT or PT Student Type Full-time Student

HOME Attending Institute of Higher Learning Yes

Add to Member List Cancel

IMPORTANT NOTE

The Head of Household cannot be deleted.

Members Summary

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

Members Summary	
Family Members	1
Adults with Income	1
Dependents Under 18	0
Occupants 62 and Over	1
Student Head of Household	No
Full-Time Students	0
Disabled Household	No

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*.

Add Income

Member *
Jane Doe ▼

Income Type *
Child Support ▼

Amount *
\$ 500.00|

Save
Cancel

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.

Edit Income

Member *
Jane Doe

Income Type *
Child Support

Amount *
\$ 600.00

Save
Cancel

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.

Delete Income

Are you sure you want to delete the Income ?

Yes
No

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.

Income Summary	
Total Income	\$9,389.73
Total Asset Income	\$16,766.81
Total Income from all Sources	\$26,156.54

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.

Delete Asset

Are you sure you want to delete the Asset ?

OK
Cancel

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.

Asset Summary	
Total Asset	\$40,451.65
Total Asset Income	\$40,451.65

Deductions

To add a new Deduction:



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

Add Deduction

Member *
Jane Doe

Deduction Type *
Limits

Amount *
\$ 120.00

 Save  Cancel

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

Actions	Member	Type	Amount
...	Jane Doe	Limits	\$120.00

To edit a Deduction:



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

Edit Deduction

Member *
Jane Doe

Deduction Type *
Limits

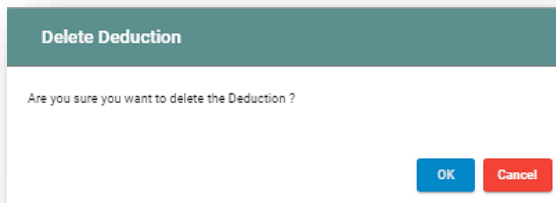
Amount *
\$ 200.00

 Save  Cancel

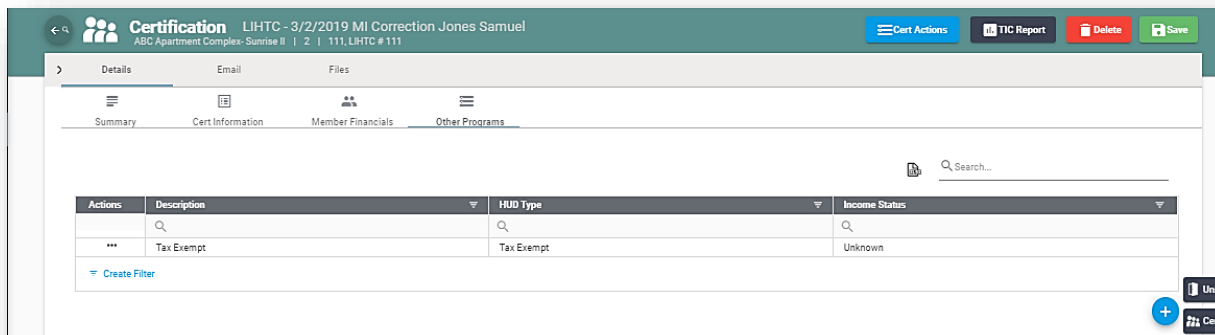
3. Click *Save* to save the changes.

Actions	Member	Type	Amount
...	Jane Doe	Limits	\$200.00

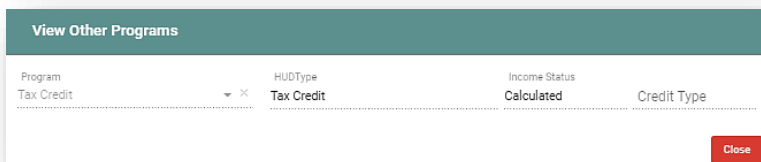
To remove a record, select *Delete* in the *Actions* column of the desired record.



Other Programs

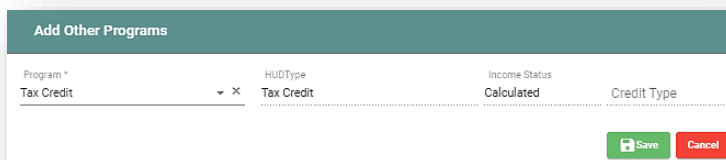


To view an Other Program record, select *View* in the *Actions* menu.



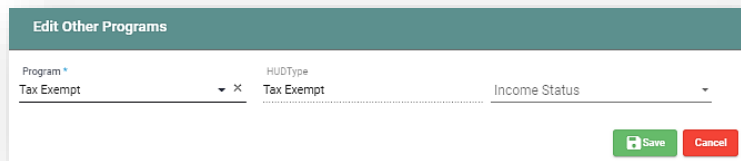
To add Other Program:

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



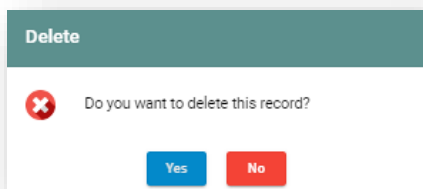
To edit an Other Program record:


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



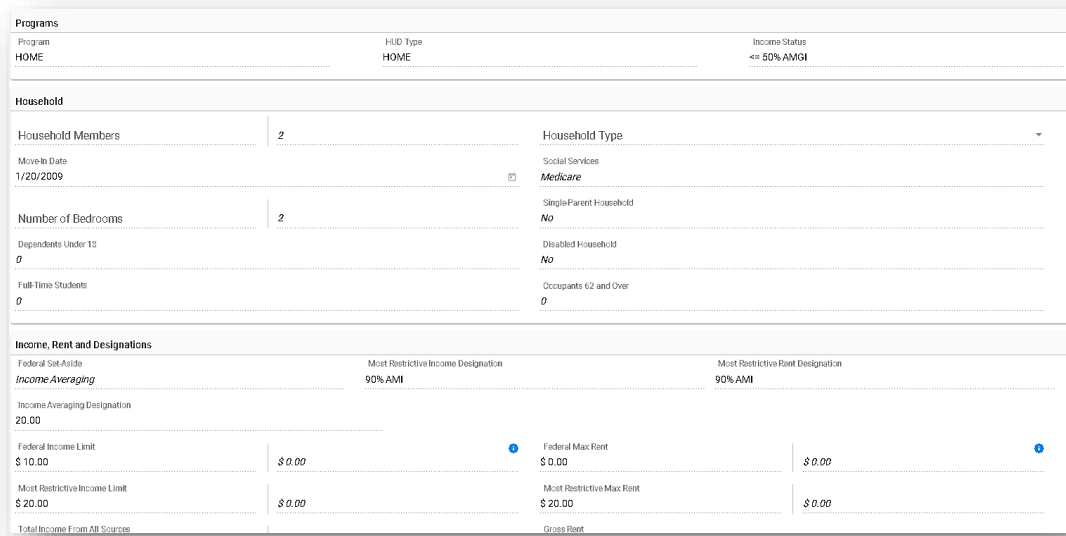
To remove a record:

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

Other Programs		
Program	HUDType	Income Status
Tax Credit	Tax Credit	Calculated

Cancel

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*.

The screenshot shows a form titled "New member's Details" with the following fields and values:

First Name *	Jane	Middle Name		Last Name *	Doe	Add to Member List	Cancel
Relationship *	Child/Dependent	Last 4 SSN *	1234	Alien Reg. Number			
Races *	African American / Black	Birth Date *	3/7/1991	Marital Status			
Ethnicity		Gender *	Female	Special Status			
Disabled		LIHTC Student					

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

IMPORTANT NOTE

Note: You cannot delete the Head of Household.
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

Members Summary	
Family Members	1
Adults with Income	1
Dependents Under 18	0
Occupants 62 and Over	1
Student Head of Household	No
Full-Time Students	0
Disabled Household	No

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.

Add Income


Member *
James Stone

Income Type *
General Assistance

Amount *
\$ 750.00

OK Cancel

To edit a record:

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

Edit Income

Member *
Lance Morgan

Income Type *
Non-Federal Wage

Amount *
\$ 15,000.00

OK Cancel

To remove a record, click **Delete**

Delete Income

Are you sure you want to delete the Income ?

OK Cancel

Income Summary

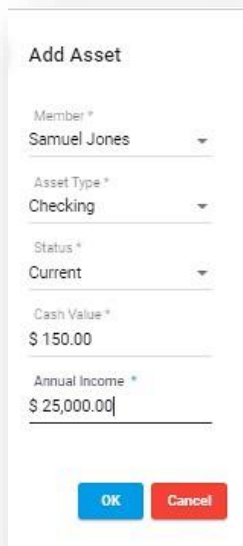
This section summarizes the income of all members who reside in the Unit. The system is now displaying income rounding to the nearest cents.

Income Summary	
Total Income	\$9,389.73
Total Asset Income	\$16,766.81
Total Income from all Sources	\$26,156.54

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.



Add Asset

Member *
Samuel Jones

Asset Type *
Checking

Status *
Current

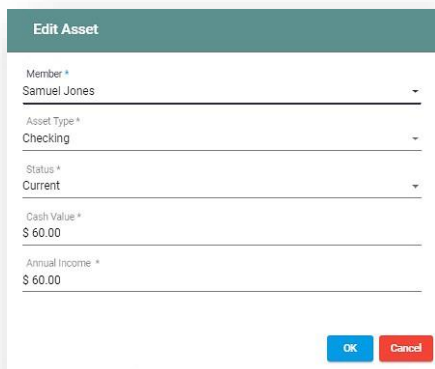
Cash Value *
\$ 150.00

Annual Income *
\$ 25,000.00

OK Cancel

To Edit an Asset:

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



Edit Asset

Member *
Samuel Jones

Asset Type *
Checking

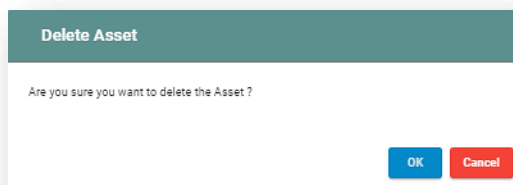
Status *
Current

Cash Value *
\$ 60.00

Annual Income *
\$ 60.00

OK Cancel

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



Delete Asset

Are you sure you want to delete the Asset ?

OK Cancel

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.

Asset Summary	
Total Asset	\$40,451.65
Total Asset Income	\$40,451.65

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 TaxCredit program.

Add Deduction

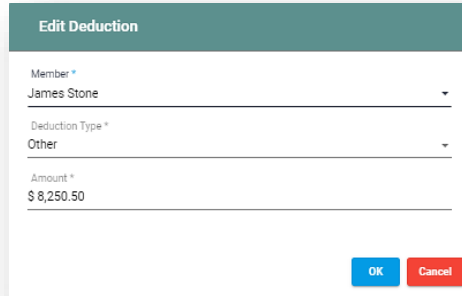
Member *
James Stone

Deduction Type *
Other

Amount *
\$ 8,250.50

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*.



Edit Deduction

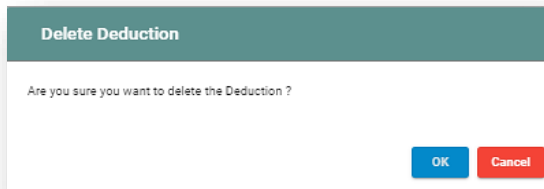
Member *
James Stone

Deduction Type *
Other

Amount *
\$ 8,250.50

OK Cancel

To remove a record, click *Delete*.



Delete Deduction

Are you sure you want to delete the Deduction ?

OK Cancel

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. "NA" - <i>Not Applicable</i> , "EL"- <i>Elderly</i> , "FA" – <i>Family</i> , HO" – <i>Homeless</i> , "RC" - <i>RCAC</i> , "DS" – <i>Displaced</i> , "SN" - <i>Special Needs NA, Elderly, Family, Homeless, RCAC, DS and Special Need</i>
Move-In Date	Date the household occupied the Unit
Social Services	Blank or a value selected manual from the <i>HDS Social Services</i> 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 <i>Income Averaging</i> , then this field displays the <i>Income Designation</i> 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

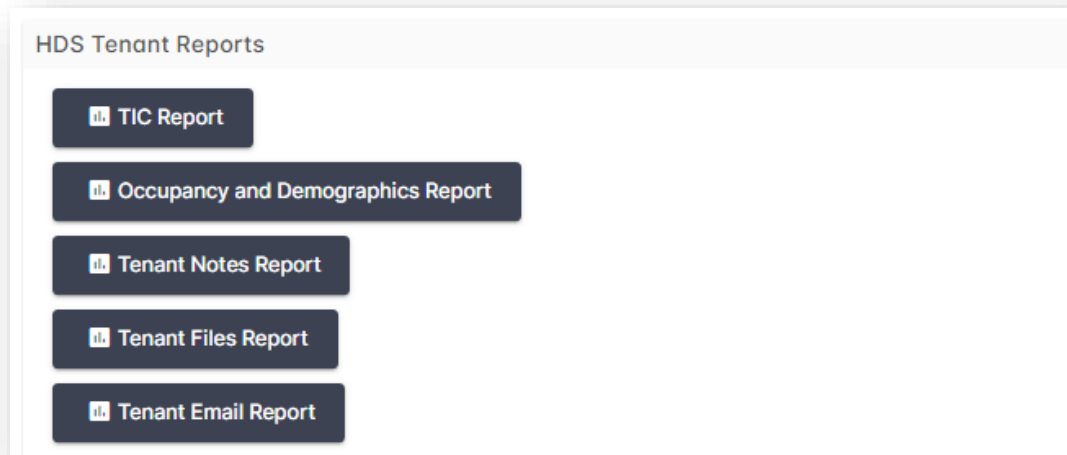
Social Sec Total	The sum of income types PE = Pensions, SI = Supplemental Security Income, and SS = Social Security
Public Assist Total	The sum of income types T = TANF (Formerly AFDC) and G = General Assistance
Other Total	The sum of income types CS = Child Support, I = Indian Trust, N = Other Non-Wage 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 <i>HUD, Rural Development</i> or the <i>Public Housing Authority</i>
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 <i>Federal Income Designation</i> 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 <i>Income Designation</i> 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 <i>HUD, Rural Development</i> or the <i>Public Housing Authority</i>
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*.

The screenshot shows a form titled "TIC Report" with a teal header. The form contains several input fields arranged in a grid:

- First Name: Morgan
- Last Name: _____
- Unit Number: _____
- Program: LIHTC (dropdown menu)
- LIHTC Unit Number: _____
- TRACS Unit Number: _____
- BIN: _____
- Building Name: _____
- Site Number: _____
- Site Name: _____
- Site Process Type: Select... (dropdown menu)

At the bottom right of the form, there are two buttons: "Search" (dark blue) and "Cancel" (red).

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

TENANT INCOME CERTIFICATION

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

Initial Certification Recertification Other:
 Unit Transfer - from Unit # _____

PART I - DEVELOPMENT DATA
 Property Name: Birchmount Housing County: Miami - Dade BIN #: FL-02-02234 PISD:
 Address: 33 NE 24th Street Virginia Gardens, FL Unit #: 1200 # Bedrooms: 2 Sq. Footage: 5,000
 33332333

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	Jarret	Williams	Live-in caretaker	8/14/2014 (3)	No	8520			N
5	Jast	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) Coll	(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*.

Occupancy and Demographics Report

Site Selection
 ABC Apartment Complex- Sunrise | X

All Current Tenants Include Archived **Run**

Close

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

Occupancy and Demographics Report

Site Selection: ABC Apartment Complex- Sunrise II All Current Tenants Include Archived

Drag a column header here to group by that column

Site Name	Project Number	Building	Unit Number	Head of HH Last Name	Enter Date	Move In Date	Cert Date	Status	Cert Type	# Students
ABC Apartment Complex- Sunrise...	10-004	2	TestBG	BG			03/01/2019	Un-Submitted	MI	0
ABC Apartment Complex- Sunrise...	10-004	2	Test333	Marley	03/02/2019		03/05/2019	Un-Submitted	MI	0
ABC Apartment Complex- Sunrise...	10-004	1	caro test1	caro	05/26/2020	04/15/2020	05/26/2020	Submitted	UT-O	0
ABC Apartment Complex- Sunrise...	10-004	122100000	1	Daloo	11/13/2013	11/04/2010	03/11/2019	Submitted	UT-O	0
ABC Apartment Complex- Sunrise...	10-004	122100000	123	Daloo	01/27/2020	11/04/2010	01/28/2020	Un-Submitted	IC	0
ABC Apartment Complex- Sunrise...	10-004	2	999	LL	02/28/2019		03/05/2019	Un-Submitted	MI	0
ABC Apartment Complex- Sunrise...	10-004	FL 011520009	5	Michaels	08/05/2022	04/14/2009	04/06/2022	Submitted	UT-I	0
ABC Apartment Complex- Sunrise...	10-004	FL 011520009	10000	Millerson	07/01/2022	07/01/2022	07/01/2020	Submitted	MI	0

Page 1 of 4 (32 items)

Tenant Notes Report

1. Click on *Notes Report*.

Tenant Notes Report

Site Selection* Birchmount Housing Building Selection* Select All (+1 Buildings)

Unit Selection* 1200 Cert Selection* 3/22/2018 12:00:00 AM Williams, Vanessa

Create Data Range mm/dd/yyyy* 3/1/2024 To mm/dd/yyyy* 3/9/2024

Created By System Administrator

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*.

Tenant Files Report

Site Selection*
Birchmount Housing

Building Selection*
Select All (+1 Buildings)

Unit Selection*
1200

Cert Selection*
Mar 22 2018 12:00AM - Williams Vanessa

Created Date Range

mm/dd/yyyy*

3/1/2024

mm/dd/yyyy*

3/9/2024

Created By
administrator

Run Close

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*.

Tenant Email Report

Site Selection* Building Selection*

Birchmount Housing Select All (+10 Buildings)

Unit Selection* Cert Selection*

(+11 Units)

Create Data Range mm/dd/yyyy* mm/dd/yyyy*

3/1/2024 3/9/2024

Created By System Administrator

Run
Close

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

Search Reports XML Tenant Upload

Site Name / Site #
HDS XML Property

Supported Versions: 5.0, 6.0, 7.0

SELECT XML FILE or Drop a file here

NAHMA 5.0 Move-In Event.xml 9 KB
Ready to upload

UPLOAD FILE

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*.