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## HDS NEXTGEN MULTIFAMILY

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Compliance User Guide v1.0.5

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Housing and Development Software  
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## 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.

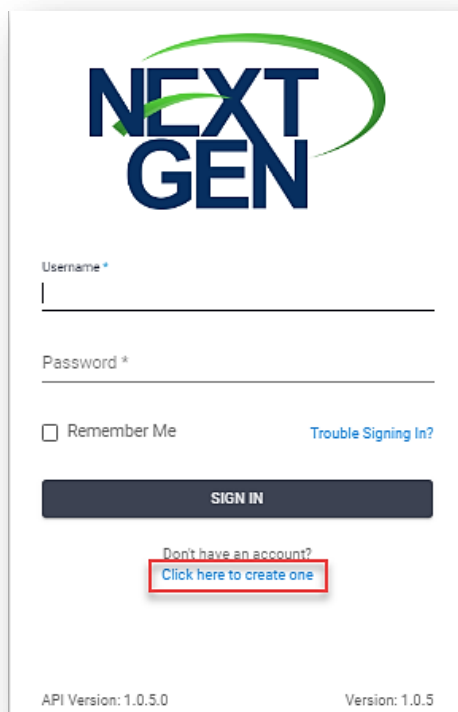
### Points of Contact

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

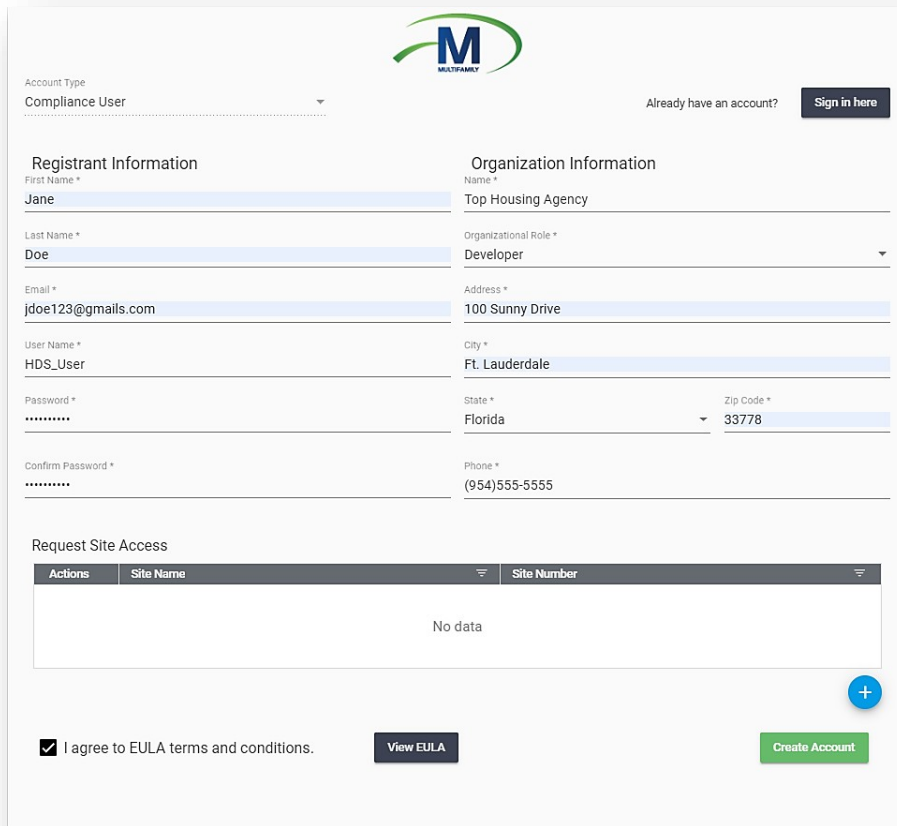
### Registration

To register for NextGen, go to the Multifamily Web Portal login page and select [Click here to create one](#) on the login screen.



The image shows the login screen for the NextGen Multifamily Web Portal. At the top is the NextGen logo, which consists of the words "NEXT" and "GEN" in a bold, blue, sans-serif font, with a green swoosh graphic behind them. Below the logo are two input fields: "Username \*" and "Password \*". Below the password field is a checkbox labeled "Remember Me" and a link "Trouble Signing In?". A dark blue "SIGN IN" button is centered below these elements. Below the button is a link "Don't have an account?" with "Click here to create one" in blue text below it. At the bottom left, it says "API Version: 1.0.5.0" and at the bottom right, it says "Version: 1.0.5".

Complete the required on the registration form. Licenses for system access must be purchased prior to registration in order to proceed. Review the terms expressed in the EULA and select the checkbox to agree.



The registration form is titled "Account Type" with a dropdown menu set to "Compliance User". At the top right, there is a "Sign in here" button. The form is divided into two main sections: "Registrant Information" and "Organization Information".

**Registrant Information:**


- First Name \*: Jane
- Last Name \*: Doe
- Email \*: jdoe123@gmails.com
- User Name \*: HDS\_User
- Password \*: [masked]
- Confirm Password \*: [masked]

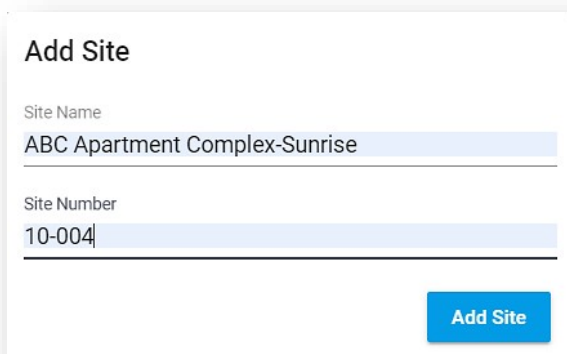
**Organization Information:**

- Name \*: Top Housing Agency
- Organizational Role \*: Developer
- Address \*: 100 Sunny Drive
- City \*: Ft. Lauderdale
- State \*: Florida
- Zip Code \*: 33778
- Phone \*: (954)555-5555

Below the registration fields is a "Request Site Access" section. It contains a table with columns "Actions", "Site Name", and "Site Number". The table is currently empty, displaying "No data". To the right of the table is a blue circular button with a white plus sign (+).

At the bottom of the form, there is a checkbox labeled "I agree to EULA terms and conditions." with a "View EULA" button next to it. To the right is a green "Create Account" button.

To request access to a site, click **New**  and enter the site details. Click **Add Site** to complete your actions.



The "Add Site" form is a simple modal window. It has two input fields:

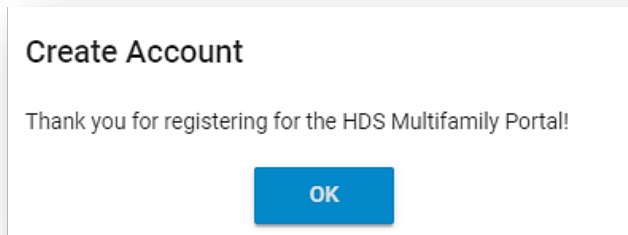
- Site Name:** ABC Apartment Complex-Sunrise
- Site Number:** 10-004

At the bottom right of the form is a blue "Add Site" button.

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



Once you've completed the form, select **Create Account**. You will receive a message indicating that you have finished your registration to NextGen.



Users who have been added to the Mail Recipient(s) list in **MFMS > Multifamily > Web Configuration** will be able to view and accept your request. After you've been approved, you will receive an email notification instructing you to log into the system with the username and password you provided at registration. All users must be approved before logging into 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.

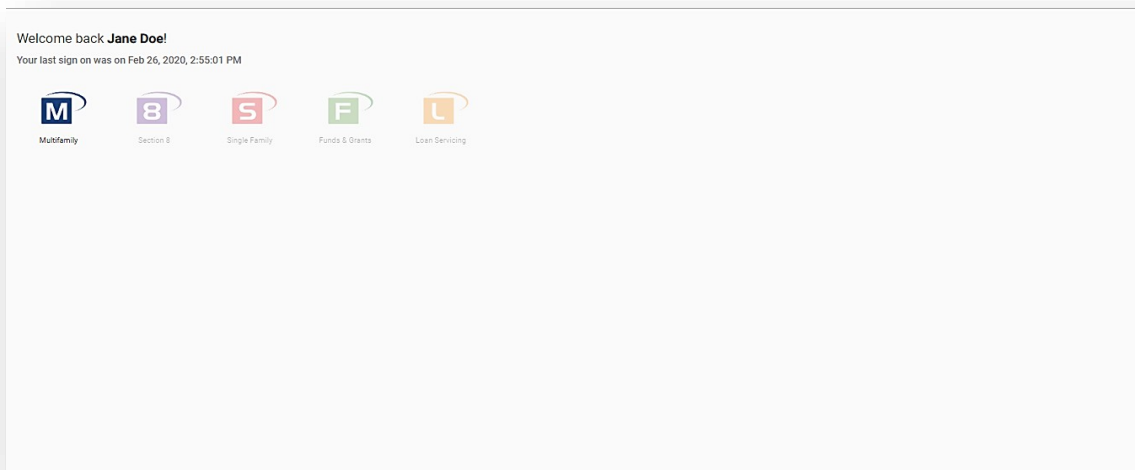
The sequence shows the progression of the login page. In step 1, the user enters credentials and agrees to the EULA. In step 2, the system checks the agreement, and the SIGN IN button becomes active. In step 3, the user is ready to sign in, and the Remember Me option is available.

**Note:** If you do not use the application for an hour, you must log in again.

If you have forgotten your username or password, click **Trouble Signing In?** and follow the prompts to retrieve your credentials. An email with your user ID or instructions for creating a new password will be sent to the email address you registered with. Click **Back to Sign In** to return to the previous page. If an option is not selected, you will receive an error message that states, “*Select an option*”.

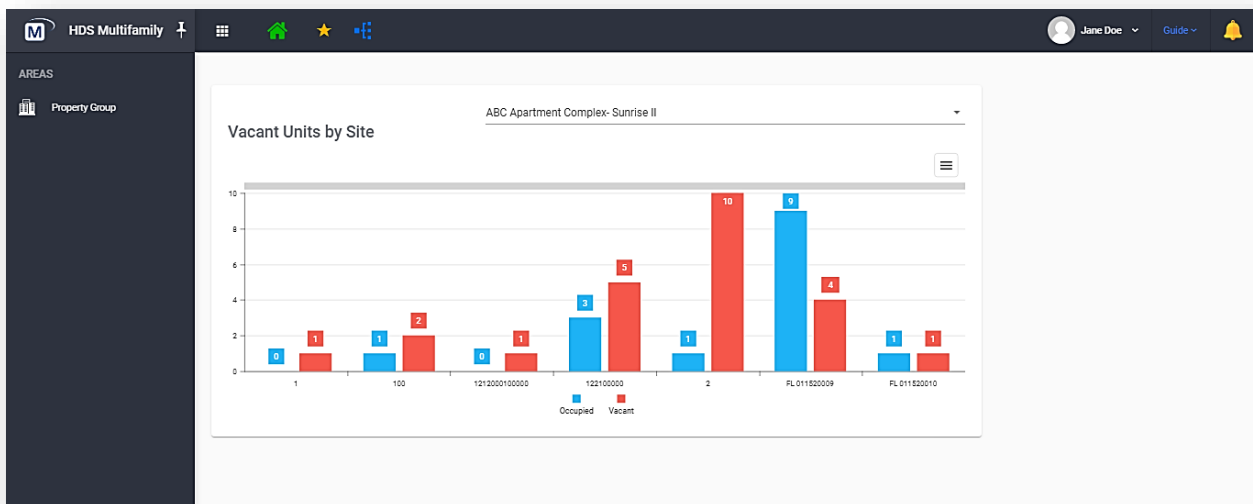
This dialog box allows users to report login issues. They can select whether they forgot their User ID or need to reset their password. The 'Back to Sign In' button returns them to the login page, while the 'OK' button likely dismisses the dialog.

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

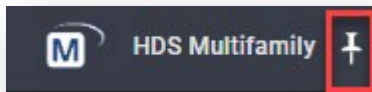



## Navigation Tools


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.

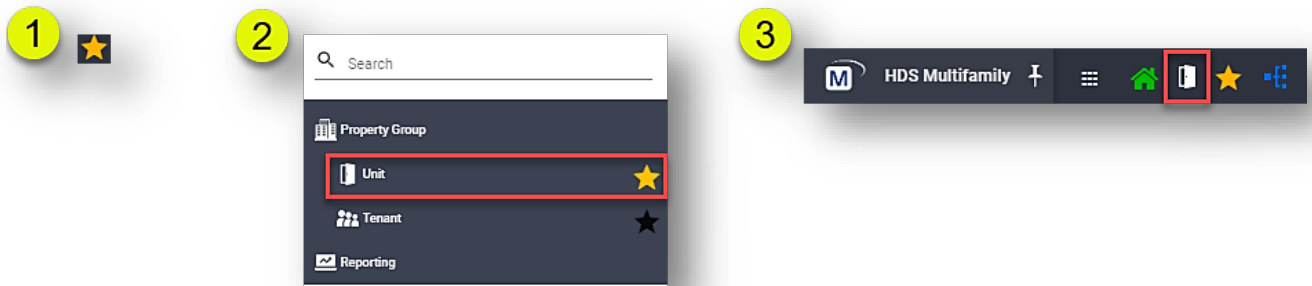
### Toolbar Icons

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.

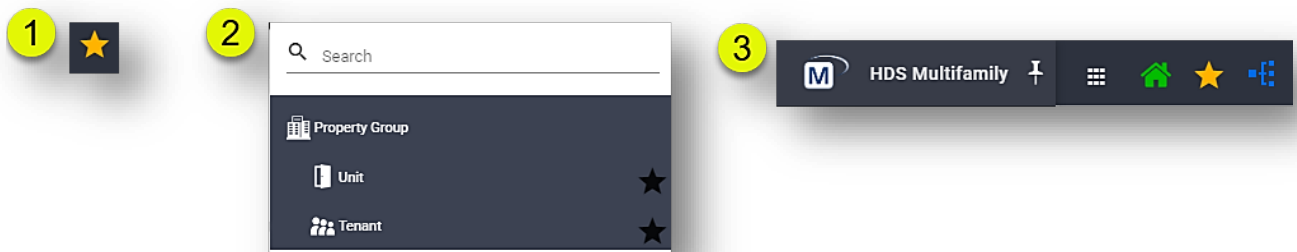


To return to the NextGen multi-product page, click . On this page, you can select a different NextGen program or view the date/time of your last sign on.


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.

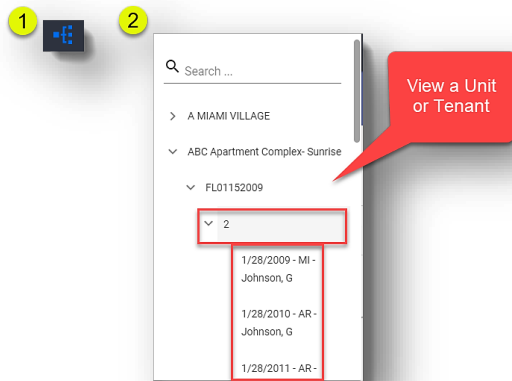



Remove shortcuts by clicking on the selected option(s) in the **Favorites** menu.




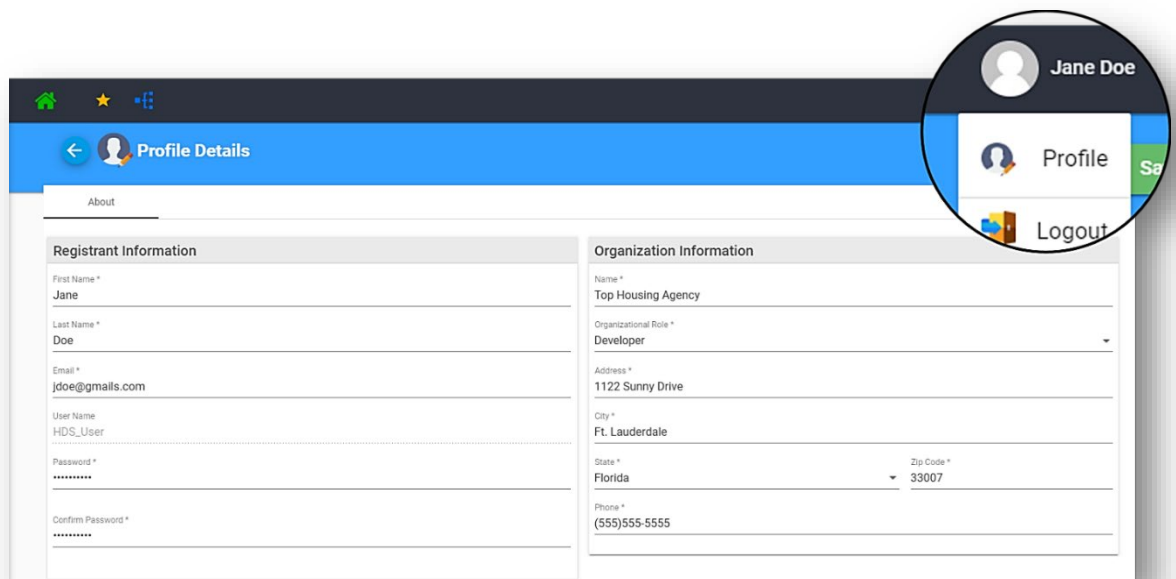





To access the units and tenants from the toolbar, click 





To view **What's New** – a summary of system updates – and the **HDS NextGen User Guide**, click **Guide**  and select an option.

Your profile page is in the user account menu on the toolbar. The *Profile Details* shows the information used to create your NextGen account. In this area, you can view and modify your personal information and details of your company. Usernames are not editable and will remain grayed out. To view your information, click  and select **Profile** from the drop-down.





  


  **Profile Details**

About

Registrant Information	Organization Information
First Name * Jane	Name * Top Housing Agency
Last Name * Doe	Organizational Role * Developer
Email * jdoe@gmail.com	Address * 1122 Sunny Drive
User Name HDS_User	City * Ft. Lauderdale
Password * *****	State * Florida
Confirm Password * *****	Zip Code * 33007
	Phone * (555)555-5555

 Jane Doe

 Profile

 Logout

A listing of sites you've requested access to is in **Site Access**. This area is read-only. When you've completed your changes to the **Profile Details**, click **Save**.

Site Access	
Site Name	Site #
ABC Apartment Complex- Sunrise	10-004


## Alerts and Notifications

*Alerts* are generated when certain actions –described in this guide– take place the Property Group work areas. *Notifications* are connected to the email functionality for Property Group work areas.

You will receive notifications to inform you of email messages that have been sent to your NextGen account, as emails are connected to individual user profiles. You can respond to email messages directly from within the notification.

1. Click the notification to open the email message.

2. Enter reply message and click **Send**.

To clear alerts and notifications individually, click **Dismiss** from within the alert. To clear all alerts and notifications, click **Dismiss All** located at the top of the list. Alerts and notifications are visible for sites you have been granted access to. To view alerts, click  located on the right side of the toolbar.

## Reference Guide

### Related Data Tree View

You can navigate to a site's related building, units and certifications by using the *Related Data Tree*. To view the BINs, units, and certifications associated with the site, click the ▶ icon next to **Details**. Continue to click the ▶ icon to move down the hierarchy and view the BINS, units and tenant for a given site. Select a level and you will be redirected to that work area. At the tenant-level, cert details (when applicable) will be displayed using the following format:




***Last Name, First letter of First Name - Effective Date - Cert Type - Program Type - UT Description when applicable - Status***



**Note:** The Related Data Tree can be accessed from all the submodules within the Property Group.

### Navigation Tabs

*Navigational tabs*, located on the right-hand side of each record's screen, allow for easy navigation to various areas of the system without using the search functionality.


Navigation Tabs	Description
 Units	Displays the list of units associated to the buildings. The units tab displays <b>General</b> , <b>LIHTC</b> and <b>TRACS</b> unit numbers. Selecting an option in the table will redirect you to the <b>Unit &gt; General Information</b> area.
 Certs	Displays a list of Tenant Certifications for all tenant members which resided in the unit. To view certification details, click on a Tenant Certification.
 Priors	Displays a list of all previous certifications.

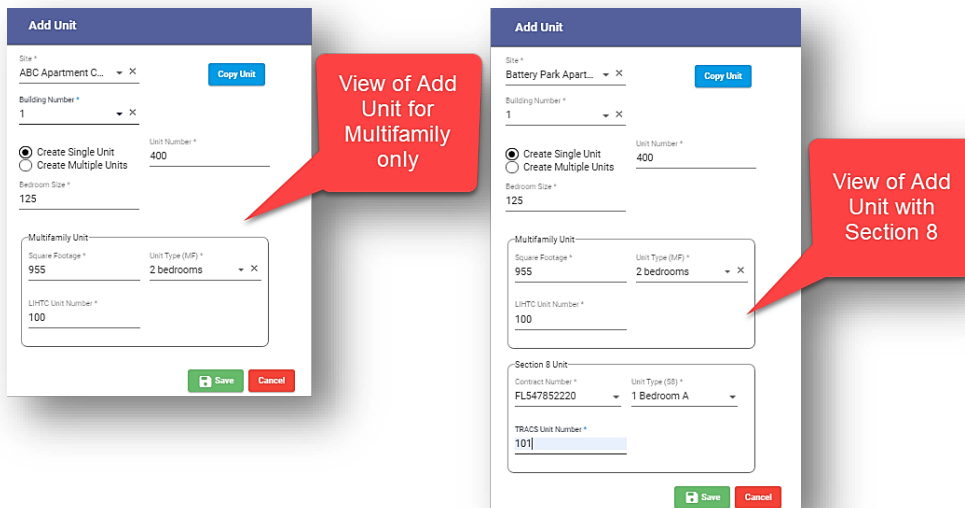
## Property Group

### 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 the **Add Unit**  located in the top-right corner of the **Search** area.
2. Select the site and **Building Number** and enter the **Unit Number** and **Bedroom Size**.
3. Select how many units you want to create:
  - 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**.



The image displays two versions of the 'Add Unit' form. The left form is for a 'Multifamily Unit' and includes fields for 'Square Footage' (955), 'Unit Type (MF)' (2 bedrooms), and 'LIHTC Unit Number' (100). A red callout bubble points to this form with the text 'View of Add Unit for Multifamily only'. The right form is for a 'Section 8 Unit' and includes fields for 'Contract Number' (FL547852220), 'Unit Type (SB)' (1 Bedroom A), and 'TRACS Unit Number' (101). A red callout bubble points to this form with the text 'View of Add Unit with Section 8'.

When creating new unit records, you can copy them directly into another building. To copy unit records and use them in another building:

1. Click **Copy Unit**
2. Select the **Building Number**, **Unit Number**, **Bedroom Size**, **Unit Type**, and the **Square Footage**.
3. **Click Copy** to complete your actions. To copy multiple units, you must enter a unit number range or manually enter the numbers in the **Unit Number** field in the Add Unit pop-up box. If the units to be copied are not in consecutive order, enter the unit numbers and separate them by commas.

**Copy Unit**

Site  
Battery Park Apartments - 00065

Building Number \*  
1

Unit Number \*  
200

Bedroom Size \*  
1

Unit Type (MF) \*  
2 bedrooms

Square Footage \*  
1100

Copy Cancel

4. Click **Save** to complete your actions.

**Add Unit**

Site  
ABC Apartment Complex...

Building Number  
FL 011520009

Unit Number \*  
455

Bedroom Size \*  
255

Multifamily Unit

Square Footage \*  
920

Unit Type (MF) \*  
1 bedroom

LIHTC Unit Number \*  
101

Save Cancel

## Search

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

To search for a unit:

1. Enter the search criteria for **Site Name** and **Unit Number**.
2. Click **Search** to retrieve search results. To view additional search options, such as **BIN** and **LIHTC Unit Number**, click **Advanced Search**.
3. Click **Clear** to delete results and begin a new search.

Accessing a record can be done by clicking anywhere on the row or clicking **Edit** in the **Actions** column. The **Inactive** and **Out-of-Service** checkboxes on the far right of the grid reflect the current status of the record's unit. The **Archived** checkbox reflects the current status of the record at the site-level. Statuses displayed in the grid are read-only.

Actions	Unit Number	LIHTC Unit Nu...	TRACS Unit N...	Vacant	BIN	Building Name	Site Number	Site Name	Site Process T...	Archived	Inactive	Out-of-Service
...	5	5		<input checked="" type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartmen...	HOME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	7	7		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartmen...	HOME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	8	8		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartmen...	HOME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	20	9		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartmen...	HOME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	1-A	1-A		<input type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartmen...	HOME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	10			<input checked="" type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartmen...	HOME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	100	123		<input checked="" type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartmen...	HOME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	1100			<input checked="" type="checkbox"/>	FL 011520009	Building 1	10-004	ABC Apartmen...	HOME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8 of 5

☐ Wrap Text ☐ Show all Rows

**Note:** You must enter a value in the quick search to retrieve information.

## Certification Actions

The Certification Actions box displays information about the cert 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 MF. **TIC** is displayed for all programs except HUD MF (Section 8). If **HUD MF** (Section 8) is displayed, it will be disabled. Likewise, if the unit has a Section 8 cert, you will see Section 8 data displayed but all related actions will be disabled.

The **Site Process Types** displays the process type description. The **Site Programs** displays the programs applied at the site-level. The **Unit Programs** displays the programs applied at the unit-level.

Each cert 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 **Cert Info**. Cert options that are available 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**).

To make corrections to a certification:

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

Actions	Unit Number	LRHC 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 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"/>
	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"/>
Cert Actions	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	LRHC 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. Click **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.

To create a new certification:

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

Actions	Unit Number	LRHC 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 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"/>
	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"/>
Cert Actions	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	LRHC 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"/>

- a. Click **Create Certification**. Select the **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

Bond

Site Process Type

Bond

Unit Program

N/A

Current Certification

Site Name - #

ABC Apartment Complex- Sunrise II - 10-004

Building

FL 011520009

Unit#

7

LIHTC Unit#

7

☒ Occupied

Cert Program

LIHTC

Cert Info

01/01/2019 AR (Submitted)

Household

Bingum, Mary

Select a Certification Action

☒ Create Certification

☐ Modify Current Certification

Create Certification

Certification Type

☐ IC
☐ AR
☐ UT
☒ MO

Effective Date \*

12/17/2020

Save

Cancel

- Click **Save** to complete your actions. You will be immediately redirected to the new certification.

## Details

The *Details* page displays the record's information which is organized by the tabs in the banners.

Details

Email

Files

General Information

Programs

Status

General Information

Unit Number \*

Unit 1

Unit Characteristics

Status

☐ Active
☐ Inactive
☐ Suspended

Bedroom Size \*

2

Unit Type \*


2 bedrooms

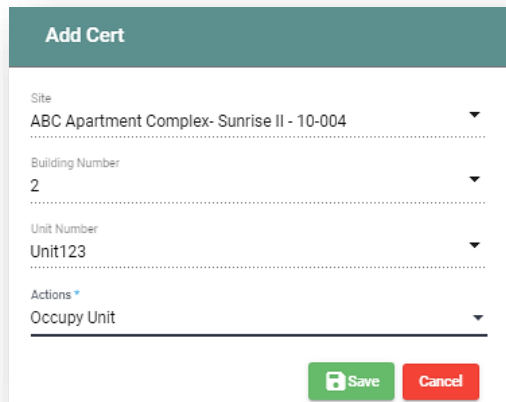
Square Footage \*

1400



To add a cert:

1. Click the **Add Cert**  located in the top-right corner of the record
2. The **Site**, **Building Number** and **Unit Number** will be inherited from the record. Select an option in the **Actions** menu.
3. Click **Save** to complete your actions.



The 'Add Cert' modal form contains the following fields:

- Site:** ABC Apartment Complex- Sunrise II - 10-004
- Building Number:** 2
- Unit Number:** Unit123
- Actions:** Occupancy Unit

At the bottom right are two buttons: a green 'Save' button and a red 'Cancel' button.

## General Information

### General Information

This section includes fields that impact Compliance Testing. To learn which fields are mandatory for Compliance Testing, please refer to the **Required Compliance Data Fields** section under **Tenant Compliance**. *See Unit Table 1 to view Unit>Details>General Information/General Information field descriptions.*

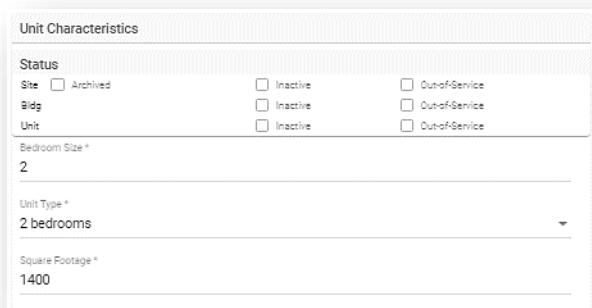


The 'General Information' form snippet shows a table with the following data:

General Information	
Unit Number *	
Unit 1	

### Unit Characteristics

This section displays important data about the unit. *See Unit Table 1 to view Unit>Details>General Information/Unit Characteristics field descriptions.*



**Unit Characteristics**

**Status**

Site ☐ Archived ☐ Inactive ☐ Out-of-Service

Build ☐ Inactive ☐ Out-of-Service

Unit ☐ Inactive ☐ Out-of-Service

Bedroom Size \*  
2

Unit Type \*  
2 bedrooms

Square Footage \*  
1400

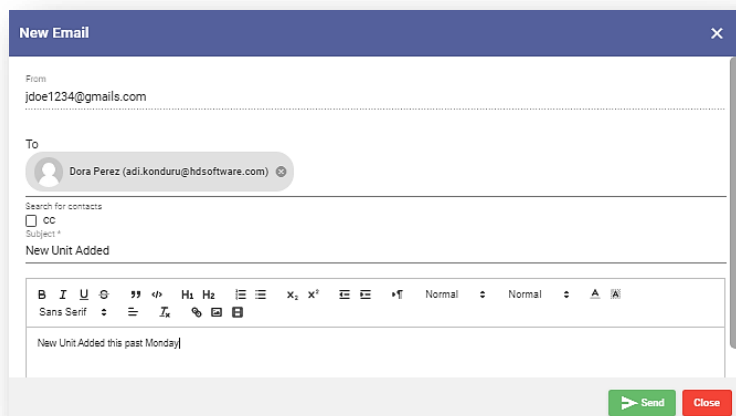
**Note:** Fields with asterisks acquire data from Windows **Unit>Unit Information & Unit>Multifamily** screens.

## 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 site, building, 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 **Add Email** [+ New Email](#)
2. Begin typing the recipient's name and select the correct contact when it is displayed.



**New Email**

From  
jdoe1234@gmail.com

To  
Dora Perez (adi.konduru@hdssoftware.com)

Search for contacts  
☐ CC  
Subject \*

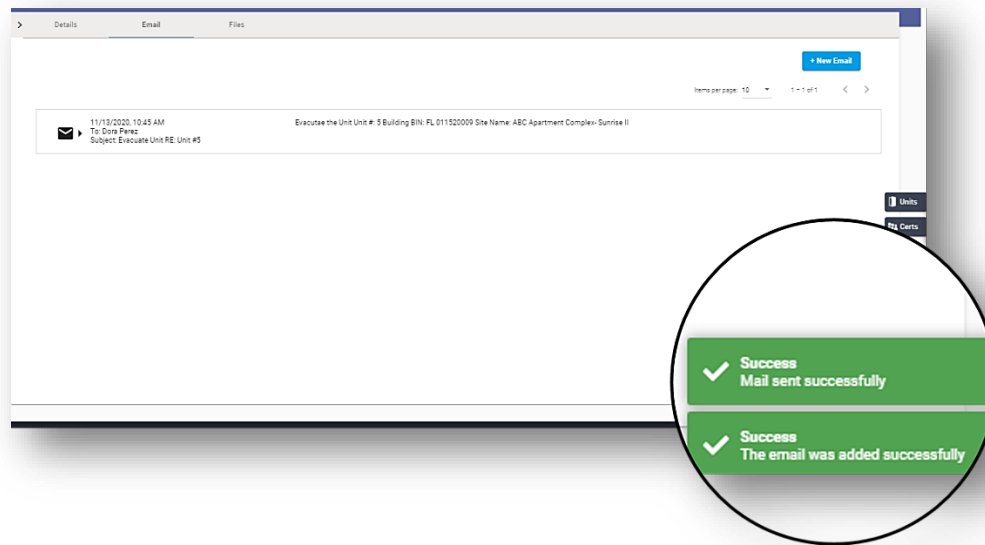
New Unit Added

B I U H1 H2 x<sub>2</sub> x<sup>2</sup> Normal Normal

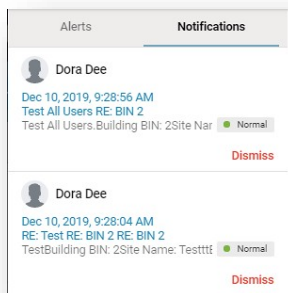
Sans Serif

New Unit Added this past Monday

3. Click **Send** when you've completed your actions.

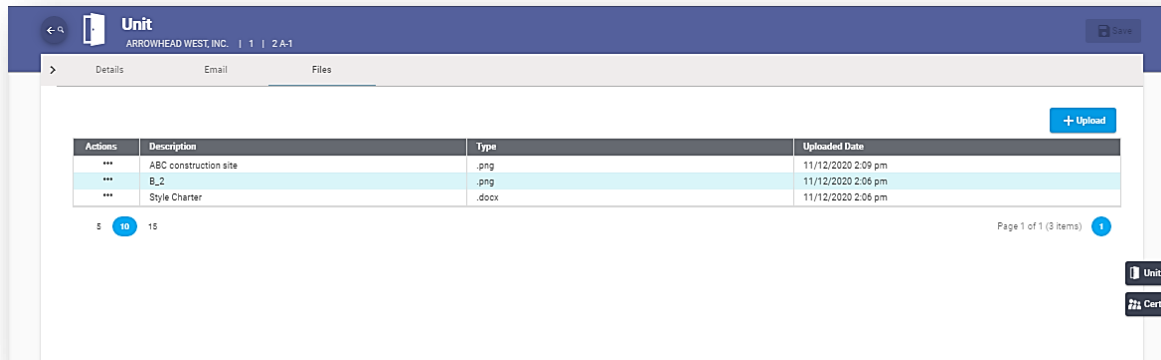


After a(n) email or note is sent, a notification will appear in under **Notifications** on the homepage.




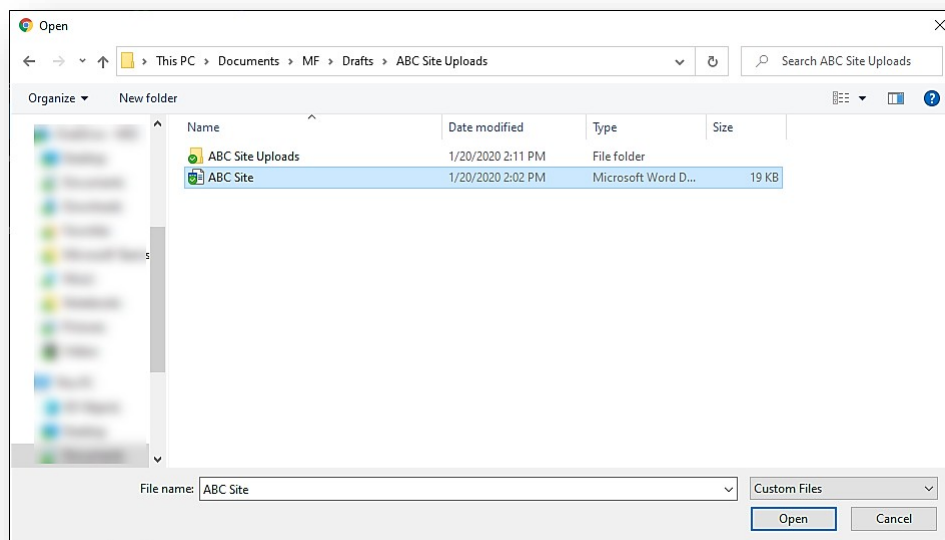
## Files

Documents and images related to a unit or tenant record are found in the *Files* area. You can upload, open and delete your files using the grid. The system accepts all file formats. Each line item displays the filename, format and a timestamp of the upload date.

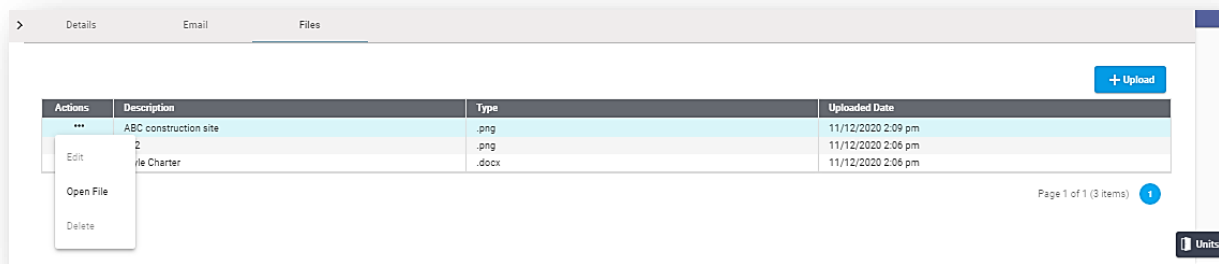


To upload a file:

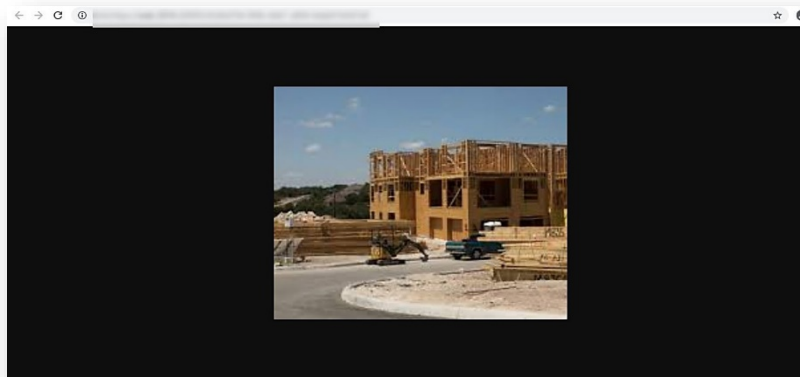
1. Click **Upload** 
2. Choose the file you wish to upload from your directory and click **Open**.



To view the file, select **Open File** in the Actions list of the record. The file will download.



To view the file, select **Open File** and the file will be downloaded.




Unit Table 1

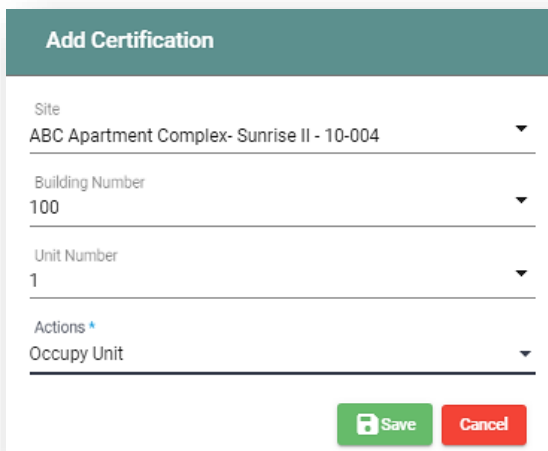
Field/Option	Description/Usage
Details>General Information - <i>General Information</i>	
<b>*Unit Number</b>	Unique number assigned to identify a unit within a building.
Details>General Information - <i>Unit Characteristics</i>	
<b>Status</b>	The current operating state of a site, building, or unit or the state of the record.
<b>Bedroom Size</b>	Represents the number of bedrooms in a unit
<b>Unit Type</b>	Represents the type of unit; for example, efficiency
<b>Square Footage</b>	Represents the total square footage of the unit.
<b>Unit Added Date</b>	Represents the date the unit was added

## Tenant

The *Tenant* work area has information about the individual(s) who are authorized to occupy a unit and the certification the tenant has attained. This work area is used to manage Tenant Certification records and view/print reports.

To add a Tenant Certification:


1. Click the **New Certification**  located in the top-right corner.
2. Select the **Site Name**, **Building Number**, and **Unit Number** from the dropdown menu. Select an option in the **Actions** menu.
3. Click **Save** to complete your actions.




## Search

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

To search for a tenant:

1. Enter the search criteria for the tenant.
  - a. Select **All** to retrieve all tenant records. Select **Current MF Tenants** to retrieve records for tenants who currently reside in a multifamily unit. Select **Current S8** to retrieve records of tenants who currently reside in a Section 8 unit.
  - b. Enter the timeframe that your tenant(s) occupied the unit.
2. Click **Search**  to retrieve search results. To view additional search options, such as **Program**, **BIN**, **Building Name** and **Site Number**, click **Advanced Search**. Use the **Certs Filter** to view all Tenant Certifications or to view current tenant only.
3. Click **Clear** to begin a new search.

**Note:** You must enter a value into one of the search fields before clicking the Search .

## Certification Actions

The Certification Actions box displays information about the cert 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 MF**. **TIC** represents all programs except HUD MF (Section 8). If **HUD MF** (Section 8) is displayed, it will be **disabled**. Likewise, if the unit has a Section 8 cert, you will see Section 8 data displayed but all related actions will be disabled.

The **Site Process Types** displays the process type description. The **Site Programs** displays the programs applied at the site-level. The **Unit Programs** displays the programs applied at the unit level.

Each cert 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 **Cert Info**. Cert options that are available 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**).

To make corrections to a certification:

### 1. Select **Cert Actions**

Actions	Unit Number	LBHIC Unit Number	TRACS Unit Number	Vacant	BIN	Building Name	Site Number	Site Name	Site Process Type	Archived	Inactive	Out of Service
CL	CL	CL	CL		FL 011520009	Building 1	10-004	ABC Apartment Complex- Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
***	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"/>
1-4	1-4			<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 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"/>
Test5553	Test5553	LBHIC 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. Click **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.

To create a new certification:

1. Select **Cert Actions**

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
---	CL	CL	CL		CL	CL	CL	CL	CL			
---	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			<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"/>
	1.4	1.4		<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	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"/>
---	Two553	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. Click **Create Certification**. Select the **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

Other

Unit Program

N/A

Site Process Type

Compliance

Current Certification

Site Name - #

Aba-1 - Aba-111

Building

1

Unit#

1

LIHTC Unit#

1

Occupied

☒

Cert Program

LIHTC

Cert Info

12/10/2020 AR (Submitted)

Household

Doe, John

Select a Certification Action

☒ Create Certification

☐ Modify Current Certification

Create Certification

Certification Type

☐ IC
 ☐ AR
 ☐ UT
 ☒ MO

Effective Date \*

12/18/2020

Save

Cancel

3. Click **Save** to complete your actions. You will be immediately redirected to the new certification.



## Details

The *Details* page displays the record's information which is organized by the tabs in the banners.

The screenshot shows the 'Details' page with tabs for Summary, Cert Information, Member Financials, and Other Programs. The 'Cert Information' tab is active, displaying the following data:

Programs		HUD Type	Income Status
Program	Tax Credit	Tax Credit	Calculated
Program	HOME	HOME	Income Status
Program	Other	Other	Income Status

Household		Household Type
Household Members	2	SingleParentHousehold
Move-in Date	03/01/2019	
Number of Bedrooms	2	Disabled Household
Dependents Under 18	0	Occupants 62 and Over
Full-Time Students	0	

Income, Rent and Designations		Most Restrictive Income Designation	Most Restrictive Rent Designation
Income Averaging Designation	Income Averaging	60% AMI	60% AMI
Federal Income Limit	\$ 0.00	Federal Max Rent	\$ 910.00
Most Restrictive Income Limit	\$ 32,350.00	Most Restrictive Max Rent	\$ 1,092.00
Total Income from All Sources	\$ 26,156.54	Tenant Paid Rent	\$ 589.55
		Utility Allowance	\$ 79.75
		Non-Optional Charges	\$ 10.50

The options in the certification banner affect the certification that is currently open. The **Cert Actions** options will be different depending on the state of the cert.

The screenshot shows the 'Certification' banner for 'LIHTC - 12/23/2020 AR Doe John'. It includes the following options: **Cert Actions**, **TIC Report**, **Delete**, and **Save**.

Use **Cert Actions** to perform various actions for a certification. The program that the certification is for and the cert's status will determine what cert actions are available.

To view the **Tenant Income Certification** report, click **TIC Report**. A printable version of the report will open in a new browser.

**TENANT INCOME CERTIFICATION**

Certification Type: Recertification

Certification Date:	10/7/2015
Move-in Date:	9/23/2010

**PART I - DEVELOPMENT DATA**

Site Name: Birchmount Housing Building: Tax Credit  
 Address: 33 NE 24th Street Daytona Beach, FL 85201 BIN#: FL-03-03234  
 County: Pinellas Unit Number: 101 # Bedrooms:

**PART II - HOUSEHOLD COMPOSITION**

Last Name	First Name	Relationship	Age	Gender	Race	Ethnicity	F/T Student	SSN	Disabled?
Wilson	Serena	Head of Household	30	Female	AI		No	2555	Y
James	peters	Unborn Child/Anticipated Adoption or Foster	-2				No	9999	N

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

Full Name	Income Source	Amount
Serena Wilson	Federal Wage	\$35,000
<b>Total Income:</b>		<b>\$35,000</b>

**PART IV - INCOME FROM ASSETS**

Type of Asset	Member Name	C/I	Cash Value of Asset	Annual Income from Asset
Other	Serena Wilson	Current	\$5,000	\$2,500
Totals:			\$5,000	\$2,500
Cash Value Total (If over \$5,000)		Passbook Rate	Imputed Income	
\$0	X	0.06 %	=	\$0
Enter the greater of the Annual Income from Asset Total or the Imputed Income Total:			<b>TOTAL INCOME FROM ASSETS</b>	<b>\$2,500</b>

**Note:** All certifications within the unit must be submitted, otherwise, the Actions menu will not be available.

## Summary

The *Summary* displays information about the certification that has been uploaded to the system. This tab is read-only and shows details about the **Programs, Household, Income, Rent and Designations, and Assets**. See *Tenant Table 2 for Tenant>Details>Summary field descriptions*.

**Certification** LHTC-8/1/2017 MI K56test  
 Tenant: Senior Terrace | AZ-00-01019 | K56 LHTC # K56

**DETAILS**

**Summary** | Cert Information | Member Financials | Other Programs

**Programs**

Program	MSD Type	Income Status
Tax Credit	Tax Credit	Calculated
HOME	HOME	<= 50% AMGI
Tax Exempt Bonds	Tax Exempt	50% AMGI

**Household**

Household Members	Household Type
2	

Moved Date: 9/1/2017

Number of Bedrooms: 1

Dependents Under 18: 0

Full-Time Students: 0

**Social Services**

Single-Parent Household: No

Disabled Household: No

Occupants 62 and Over: 1

**Income, Rent and Designations**

Federal (Self-Judge): 60% AMI

Most Restrictive Income Designation: 60% AMI

Most Restrictive Rent Designation: 60% AMI

**Income Averaging Designation**

Federal Income Limit	Most Restrictive Income Limit	Federal Max Rent	Most Restrictive Max Rent
\$ 31,260.00	\$ 24,360.00	\$ 781.50	\$ 570.00
\$ 31,260.00	\$ 24,360.00	\$ 1,005.00	\$ 570.00
Total Income From All Sources	\$ 9,395.73	Gross Rent	\$ 679.80
		Tenant Paid Rent	\$ 589.55
		Utility Allowance	\$ 79.75
		Non-Optional Charges	\$ 10.50

“Created” and “Edited” timestamps are located at the bottom of each certification. The timestamps include the date and time of when the certification was edited/created, and the name of the user who manually created the certification or upload via XML.

Created 03/04/2019 9:19 AM XML Upload [administrator]

Edited 03/04/2019 9:19 AM XML Upload [administrator]

## Cert Information

Use this section to view and/or enter certification information. Most details on this page have been uploaded to the system and are read-only. See *Tenant Table 2 for Tenant>Details>Cert Info/Certification Information field descriptions*.

The screenshot shows the 'Certification' page for a tenant named 'John Doe'. The page is divided into several sections:


- Certification Information:** Includes fields for 'Certification Type' (Initial), 'Effective Date' (03/01/2019), 'Original Effective Date' (03/01/2019), 'Household Type' (Family), 'Employment Type' (Full-time), 'Unit Type' (1), 'Unit Number' (1), 'Social Services' (No), 'Housing Assistance' (Yes), 'Housing Status' (TAXI Assistance), and 'Housing Status' (TAXI Assistance).
- Recent Income Certification Details:** Shows 'Income Certification Date' (03/01/2019), 'Household Income & Total Assets Income Certification' (\$32,389.04), and 'Household Income & Total Assets Income Certification' (\$32,389.04).
- Qualification Details:** Shows 'Qualification Date' (03/01/2019), 'Household Income & Total Assets Income Certification' (\$32,389.04), and 'Household Income & Total Assets Income Certification' (\$32,389.04).
- Income, Taxes and Deductions:** Includes 'Income Tax' (\$1,230.00), 'Income Tax Deductions' (\$1,230.00), 'Income Tax Credits' (\$1,230.00), 'Income Tax Exemptions' (\$1,230.00), 'Income Tax Payments' (\$1,230.00), 'Income Tax Refunds' (\$1,230.00), 'Income Tax Credits' (\$1,230.00), 'Income Tax Exemptions' (\$1,230.00), 'Income Tax Payments' (\$1,230.00), and 'Income Tax Refunds' (\$1,230.00).
- Assistance:** Includes 'Source of Income' (Housing Assistance), 'Source of Income' (Housing Assistance), 'Source of Income' (Housing Assistance), 'Source of Income' (Housing Assistance), 'Source of Income' (Housing Assistance), 'Source of Income' (Housing Assistance), 'Source of Income' (Housing Assistance), 'Source of Income' (Housing Assistance), 'Source of Income' (Housing Assistance), and 'Source of Income' (Housing Assistance).
- Certification Totals:** Includes 'Total Income' (\$32,389.04), 'Total Assets' (\$32,389.04), 'Total Income' (\$32,389.04), 'Total Assets' (\$32,389.04), 'Total Income' (\$32,389.04), 'Total Assets' (\$32,389.04), 'Total Income' (\$32,389.04), 'Total Assets' (\$32,389.04), 'Total Income' (\$32,389.04), and 'Total Assets' (\$32,389.04).
- General Information:** Includes 'Project Details' (Project Name, Project Address, Project City, Project State, Project Zip), 'Building Details' (Building Name, Building Address, Building City, Building State, Building Zip), and 'Unit Details' (Unit Number, Unit Name, Unit Address, Unit City, Unit State, Unit Zip).

**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.

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

New member's Details

First Name \*

Jane

x

Relationship \*

Child/Dependent

▼ x

Races \*

African American / Black

▼ x

Ethnicity

▼

Disabled

▼

Middle Name

Last 4 SSN \*

1234

x

Birth Date \*

3/7/1991

📅

Gender \*

Female

▼ x

LIHTC Student

▼

Last Name \*

Doe

x

Alien Reg. Number

Marital Status


▼

Special Status

▼

Add to Member List

Cancel

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

**Note:** You cannot delete the Head of Household.


## Members Summary

The *Members Summary* categorizes the household members by is an overview of 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 **Add Income** .
2. Select an option from the **Member** and **Income Type** box and enter the **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 save the changes.

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 **Add New Assets** 
2. Select a **Member**, **Asset Type**, and **Status** and enter the **Cash Value** and **Annual Income** amounts.

### Add Asset

Member \*  
Jane Doe

Asset Type \*  
Checking

Status \*  
Current

Cash Value \*  
\$ 50.00

Annual Income \*  
\$ 27,000.00

Save

Cancel

- Click **Save** to complete your actions.

Actions	Member	Type	Status	Cash Value	Annual Income
...	John S Doe	Other	Current	\$1.87	\$5,654.81
...	Jane Doe	Other	Current	\$1.87	\$11,112.00

To edit an Asset:

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

### Edit Asset

Member \*  
Jane Doe

Asset Type \*  
Checking

Status \*  
Current

Cash Value \*  
\$ 50.00

Annual Income \*  
\$ 29,000.00

Save

Cancel



- 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:

- Click **Add New Deduction** 
- Select a **Member** and **Deduction Type** and enter the **Amount**.

Add Deduction

Member \*  
Jane Doe

Deduction Type \*  
Limits

Amount \*  
\$ 120.00

Save
Cancel

- 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. Update the record the **Edit Deduction** box.

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.

Delete Deduction

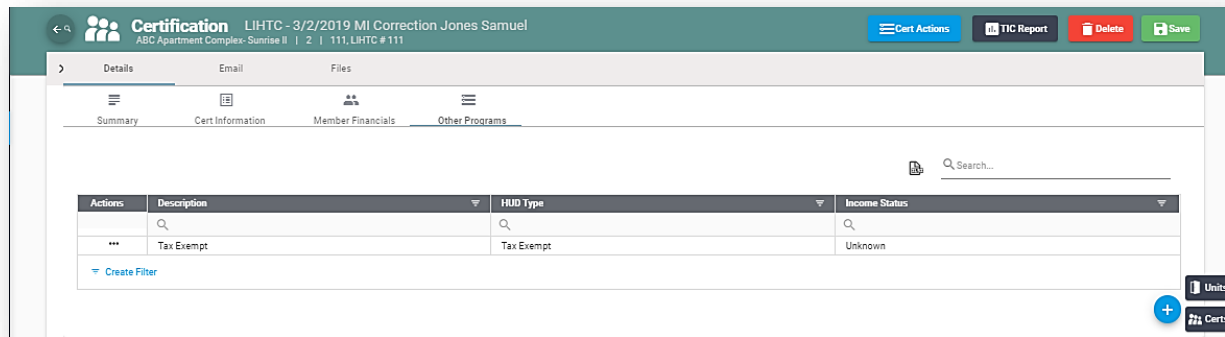
Are you sure you want to delete the Deduction ?

OK

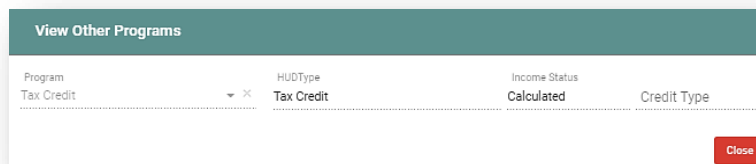
Cancel

**Note:** 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.


## Other Programs

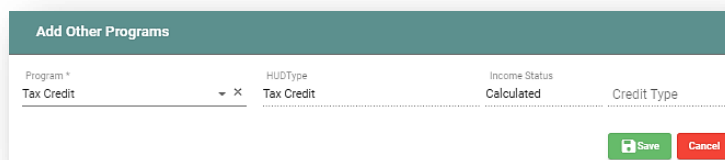


To view a Other Program record, select **View** in the **Actions** menu.



To add Other Program:

1. Click **Add Other Program** 
2. Select an option from the **Program** menu.
3. Click **Save** to save details.



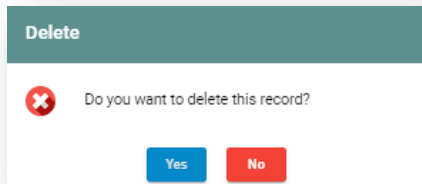
To edit a Other Program record:


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 changes before leaving the Tenant work area.

## HOME Program

Programs			
Program HOME	HUD Type HOME	Income Status ≤ 50% AMGI	
Household			
Household Members	2	Household Type	▼
Move-In Date 1/20/2009		Social Services <i>Medicare</i>	
Number of Bedrooms	2	Single-Parent Household	No
Dependents Under 18 0		Disabled Household	No
Full-Time Students 0		Occupants 62 and Over 0	
Income, Rent and Designations			
Federal Set-Aside <i>Income Averaging</i>	Most Restrictive Income Designation 90% AMI	Most Restrictive Rent Designation 90% AMI	
Income Averaging Designation 20.00			
Federal Income Limit \$ 10.00	\$ 0.00	Federal Max Rent \$ 0.00	\$ 0.00
Most Restrictive Income Limit \$ 20.00	\$ 0.00	Most Restrictive Max Rent \$ 20.00	\$ 0.00
Total Income From All Sources		Gross Rent	

## Tax Credit Program

### Other Programs

Program	HUDType	Income Status
Tax Credit	Tax Credit	Calculated

Cancel

**Note:** Income Status percentages are displayed in the last column for each program.

## Reports

This area allows you to generate **HDS Tenant Reports** and **Agency Site Reports**.

### TIC Report

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

### HDS Tenant Reports

TIC Report

Occupancy and Demographics Report

Once the search criteria are entered, click **Search**.

### TIC Report

First Name	Last Name	Unit Number
Program	LIHTC Unit Number	TRACS Unit Number
BIN	Building Name	Site Number
Site Name	Site Process Type	

Search Cancel

Click on the record desired and click **Create Report**. The search results can be organized using the features described in *Working with Grids*.

To search for a Tenant Member:

1. Enter the name in the search field.
2. Select a row and click the **Create Report** to view **TIC Report**. Click **Clear** to begin a new search.

**TENANT INCOME CERTIFICATION**  
 Certification Type: Recertification

Certification Date: 10/7/2015  
 Move-in Date: 9/23/2010

**PART I - DEVELOPMENT DATA**  
 Site Name: Birchmount Housing Building: Tax Credit  
 Address: 33 NE 24th Street Daytona Beach, FL 85201 BIN#: FL-03-03234  
 County: Pinellas Unit Number: 101 # Bedrooms:

**PART II - HOUSEHOLD COMPOSITION**

Last Name	First Name	Relationship	Age	Gender	Race	Ethnicity	F/T Student	SSN	Disabled?
Wilson	Serena	Head of Household	30	Female	AI		No	2555	Y
James	peters	Unborn Child/Anticipated Adoption or Foster	-2				No	9999	N

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

Full Name	Income Source	Amount
Serena Wilson	Federal Wage	\$35,000
<b>Total Income:</b>		<b>\$35,000</b>

**PART IV - INCOME FROM ASSETS**

Type of Asset	Member Name	C/I	Cash Value of Asset	Annual Income from Asset
Other	Serena Wilson	Current	\$5,000	\$2,500
<b>Totals:</b>			<b>\$5,000</b>	<b>\$2,500</b>

Cash Value Total (If over \$5,000)	Passbook Rate	Imputed Income
\$0 X	0.06 %	= \$0

Enter the greater of the Annual Income from Asset  
 Total or the Imputed Income Total:


**TOTAL INCOME FROM ASSETS**

**\$2,500**

To remove a certification:

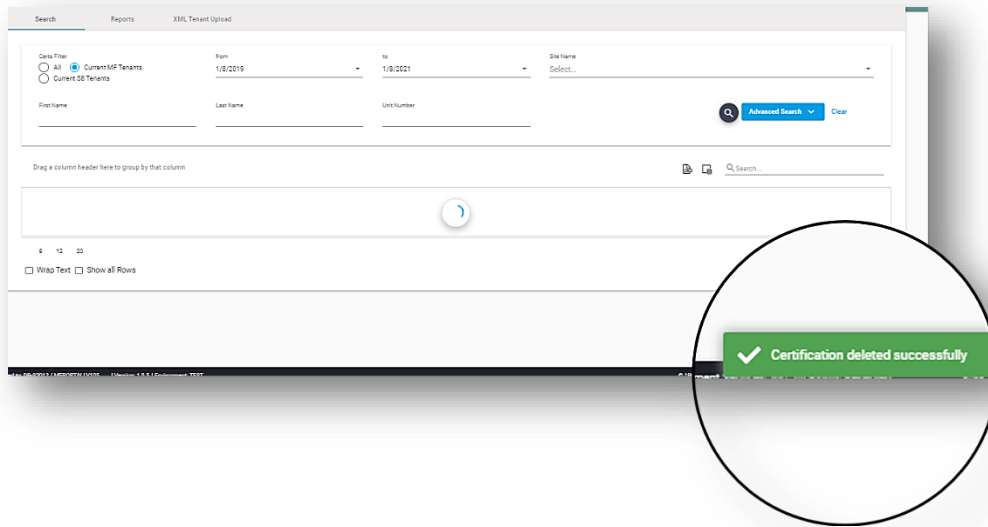
1. Click **Delete**

Delete


 Do you want to delete this certification ?

Yes
 No

2. Click **Yes** to complete your actions.



## Agency Tenant Reports

Agency Tenant Reports display the reports that were created in the Report Designer and have been assigned to the tenant-level.

To view an Agency Tenant Report:  
Select a report and click **View Report**.



## Email

See *Property Group > Unit > Email* for details on functionality.

## Files



See *Property Group > Unit > Files* for details on functionality.

## Tenant Table 2

Field/Option	Description/Usage
<b>Certification&gt;Details&gt;Summary - <i>Programs</i></b>	
<b>Program</b>	The type of program or programs for which this event is qualified
<b>HUD Type</b>	This complex type holds the information about which program or programs for which an event is qualified
<b>Income Status</b>	AMGI Percentage for Program Income
<b>Certification&gt;Details&gt;Summary - <i>Household</i></b>	
<b>Household Members</b>	Number of members as reported and calculated by HDS
<b>Household Type</b>	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>
<b>Move-In Date</b>	Date the household occupied the unit
<b>Social Services</b>	Blank or a value selected manual from the <i>HDS Social Services</i> reference table
<b>Number of Bedrooms</b>	As reported and as entered in HDS
<b>Single-Parent Household</b>	Yes or No as calculated by HDS
<b>Dependents Under 18</b>	Calculated by HDS
<b>Disabled Household</b>	Yes or No as calculated by HDS
<b>Full-Time Students</b>	Calculated by HDS
<b>Occupants 62 and Over</b>	Calculated by HDS
<b>Certification&gt;Details&gt;Summary - <i>Income, Rent, and Designations</i></b>	
<b>Federal Set-Aside</b>	As reported in the certification
<b>Most Restrictive Income Designation</b>	The most restrictive income designation as reported by the owner
<b>Most Restrictive Rent Designation</b>	The most restrictive rent designation reported by the owner
<b>Income Averaging Designation</b>	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%
<b>Federal Income Limit</b>	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
<b>Federal Max Rent</b>	The maximum permitted tenant rent based on the Federal Income Limit
<b>Most Restrictive Income Limit</b>	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
<b>Most Restrictive Max Rent</b>	The maximum permitted tenant rent based on the Most Restrictive Income Limit
<b>Total Income from All Sources</b>	Total of all income and asset income
<b>Gross Rent</b>	The sum of Tenant Paid Rent, Utility Allowance, and Non-Optional Charges
<b>Tenant Paid Rent</b>	As reported in the certification



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

<b>All Student Household</b>	If all household members are full-time students, select <b>Yes</b> . If at least one household member is not a full-time student, select <b>No</b>
<b>Utility Allowance</b>	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>
<b>Student Use Code</b>	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
<b>Certification&gt;Details&gt;Cert Info - <i>Rent Income Certification Details</i></b>	
<b>Effective Date of Most Recent Income Certification</b>	The Effective Date of the most recent certification of LIHTC income. This is populated when income is not certified, For example, a self-certification
<b>Household Income at Most Recent Income Certification</b>	Household income at the time of the most recent LIHTC qualification date
<b>Household Size at Most Recent Income Certification</b>	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
<b>Certification&gt;Details&gt;Cert Info - <i>Qualification Details</i></b>	
<b>LIHTC Qualification Date</b>	The most recent qualification date for this event
<b>Household Income at Most Recent Qualification Date</b>	Household income at the time of the most recent LIHTC qualification date
<b>Household Size at Most Recent Qualification Date</b>	Household size at the time of the most recent LIHTC qualification date
<b>Certification&gt;Details&gt;Cert Info - <i>Income, Rent, and Designations</i></b>	
<b>Federal Set-Aside</b>	The set-aside value from the building LIHTC screen
<b>*Most Restrictive Income</b>	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
<b>*Most Restrictive Rent</b>	The most restrictive rental 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
<b>Income Averaging Designation</b>	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%
<b>Federal Income Limit</b>	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.
<b>Federal Rent Limit</b>	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.
<b>Most Restrictive LIHTC Income Limit</b>	The LIHTC maximum allowable income for the unit based on an Income Designation percentage that is lower than the Federal Income Designation

<b>Most Restrictive LIHTC Rent</b>	The LIHTC maximum allowable income for the unit based on an <i>Income Designation</i> percentage that is lower than the Federal Income Designation
<b>Annual Income</b>	The total of amount reported for the household.
<b>Gross Rent</b>	Monthly rent including an estimated utility cost and non-optional charges
<b>Tenant Rent</b>	The rent that the tenant is paying
<b>Utility Allowance</b>	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</i> , <i>Rural Development</i> or the <i>Public Housing Authority</i>
<b>Non-Optional Charges</b>	The amount of non-optional charges, such as mandatory garage rent, storage lockers, charges for services provided by the development
<b>Certification&gt;Details&gt;Cert Info - <i>Assistance</i></b>	
<b>Sources of Federal Rent Assistance</b>	The program under which the federal subsidy portion of rent is being paid. If applicable, select a description
<b>Federal Rent Assistance Amount</b>	The Federal rental subsidy amount
<b>Source of Other Non-Federal Rent Assistance</b>	The program under which the non-federal subsidy portion of rent is being paid
<b>Other Non-Federal Rent Assistance</b>	The non-federal portion of the rent paid by a third party such as a housing authority
<b>Total Monthly Rent Assistance</b>	The total amount of both federal and non-federal rental assistance
<b>Certification&gt;Details&gt;Cert Info - <i>Certification Totals</i></b>	
<b>Wages Total</b>	The sum of income types B = Business, F = Federal Wage, M = Military Wage, and W = Non-Federal Wage
<b>Social Sec Total</b>	The sum of income types PE = Pensions, SI = Supplemental Security Income, and SS = Social Security
<b>Public Assist Total</b>	The sum of income types T = TANF (Formerly AFDC) and G = General Assistance
<b>Other Total</b>	The sum of income types CS = Child Support, I = Indian Trust, N = Other Non-Wage Source, and U = Unemployment
<b>Asset Cash Value Total</b>	The total of the asset values
<b>Annual Asset Income Total</b>	Total amount of other assistance received by the household
<b>Certification&gt;Details&gt;Cert Info - <i>Project Details</i></b>	
<b>Project ID</b>	Site Number
<b>Site Name</b>	The name of the site which the XML has been uploaded to
<b>XML Upload Vendor Name</b>	Displays the name of the software the management company used to create the file such as Real Page, Boston Post etc.
<b>XML Upload Created Date</b>	The date the file was created
<b>XML Upload Reporting Start Date</b>	The beginning date of the date range for the transmission file
<b>XML Upload Reporting End Date</b>	The ending date of the date range for the transmission file
<b>XML Upload NAHMA Version</b>	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.	