



HDS NEXTGEN MULTIFAMILY

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.

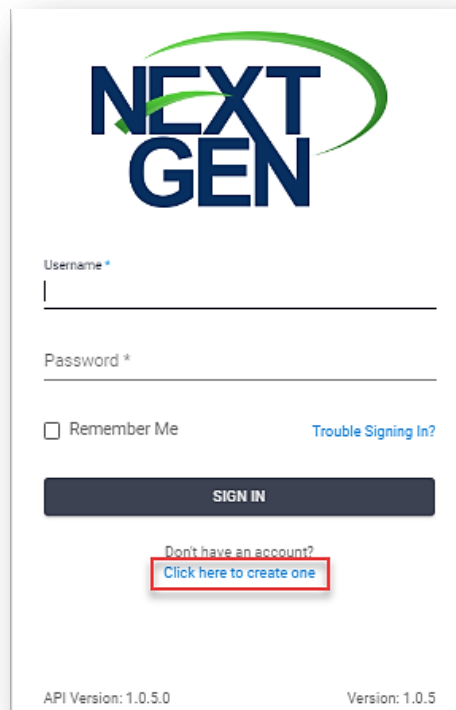
Points of Contact

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.



Username *

Password *

Remember Me [Trouble Signing In?](#)

SIGN IN

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

API Version: 1.0.5.0 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.

Account Type
Compliance User

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

Registrant Information

First Name *
Jane

Last Name *
Doe

Email *
jdoe123@gmails.com

User Name *
HDS_User

Password *
.....

Confirm Password *
.....

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

Request Site Access

Actions	Site Name	Site Number
No data		

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

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

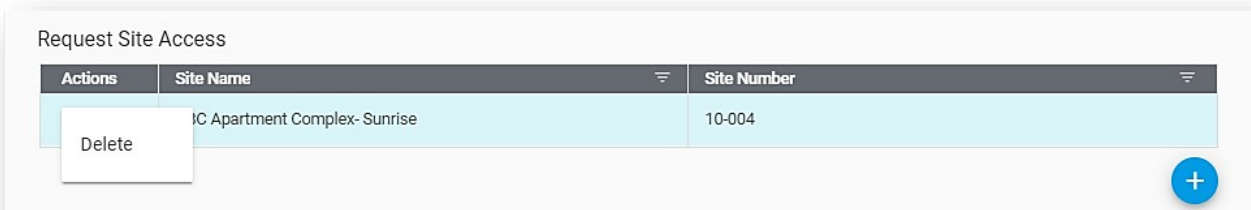
Add Site

Site Name
ABC Apartment Complex-Sunrise

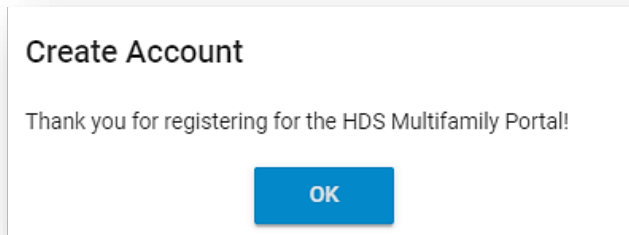
Site Number
10-004

[Add Site](#)

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 image shows three sequential screenshots of the NextGen login page, numbered 1, 2, and 3.

- Screenshot 1:** Shows the login form with the username "HDS_User001" and a masked password. The "Remember Me" checkbox is unchecked. The "SIGN IN" button is disabled. A red box highlights the "SIGN IN" button and the "I agree to EULA terms and conditions" checkbox, which is checked. A "View EULA" button is visible.
- Screenshot 2:** Shows the same login form. The "SIGN IN" button is now enabled. A red box highlights the "I agree to EULA terms and conditions" checkbox, which is now unchecked, and the "View EULA" button.
- Screenshot 3:** Shows the login form with the "Remember Me" checkbox checked. The "SIGN IN" button is still enabled. A red box highlights the "SIGN IN" button and the "I agree to EULA terms and conditions" checkbox, which is checked. A "View EULA" button is visible.

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

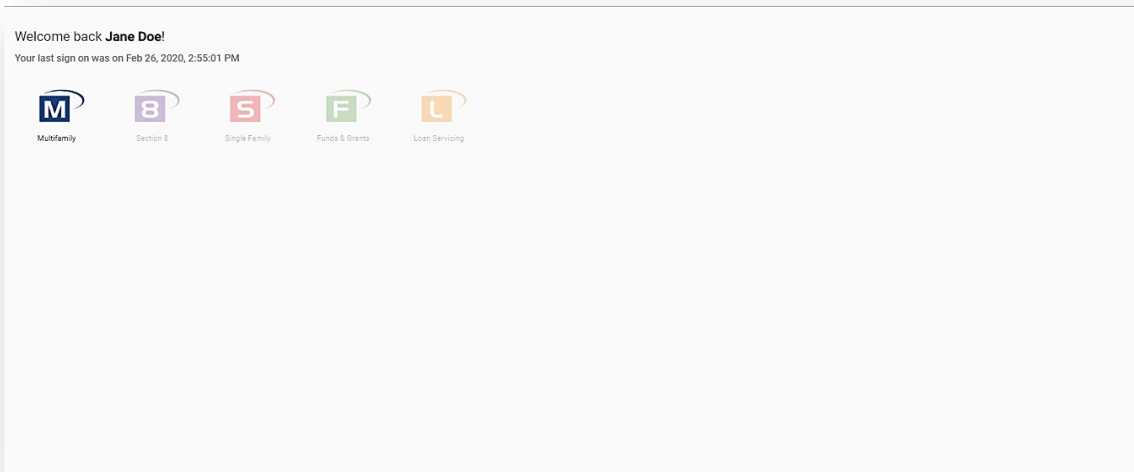
If you have forgotten your username or password, click **Trouble Signing In?** and follow the prompts to retrieve your credentials. An email with your user ID or instructions for creating a new password will be sent to the email address you registered with. Click **Back to Sign In** to return to the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

The image shows a dialog box titled "Trouble Signing In". It contains two radio button options:

- I forgot my User ID
- I forgot or need to reset my password

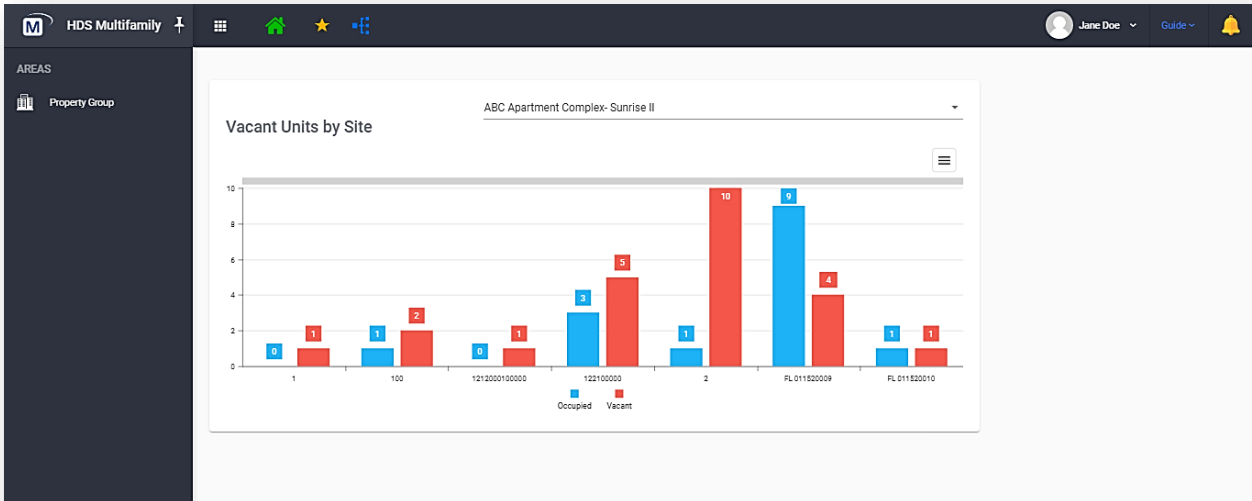
At the bottom of the dialog box, there are two buttons: "Back to Sign In" and "OK".

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.

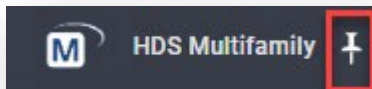



Navigation Tools


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.

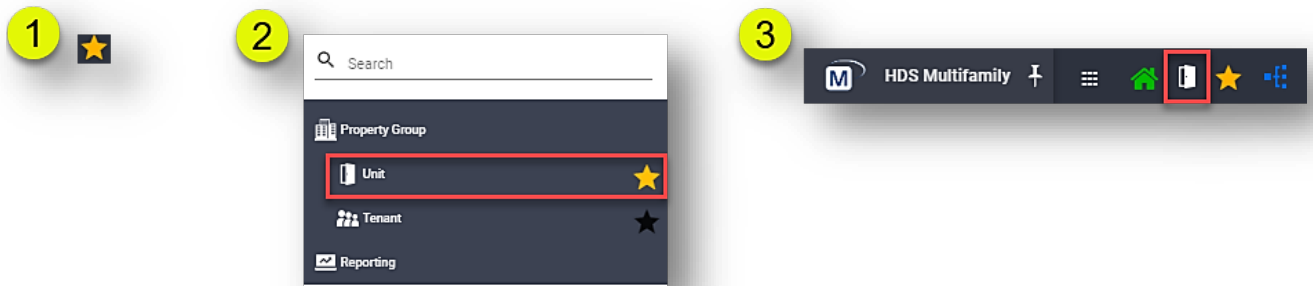
Toolbar Icons

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.

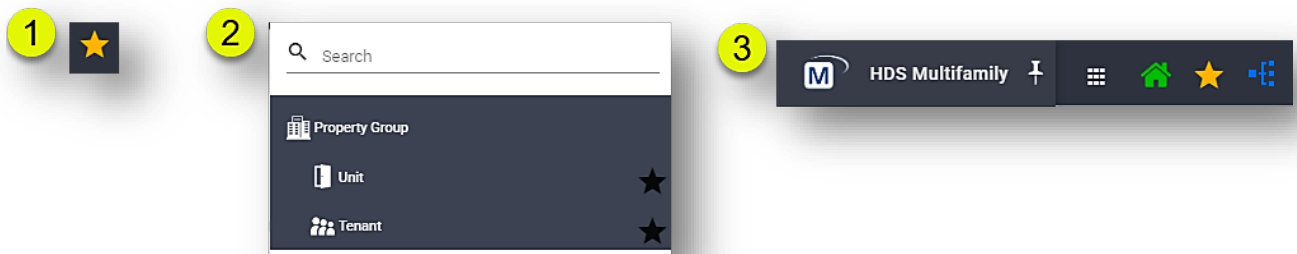



To return to the NextGen multi-product page, click . On this page, you can select a different NextGen program or view the date/time of your last sign on.

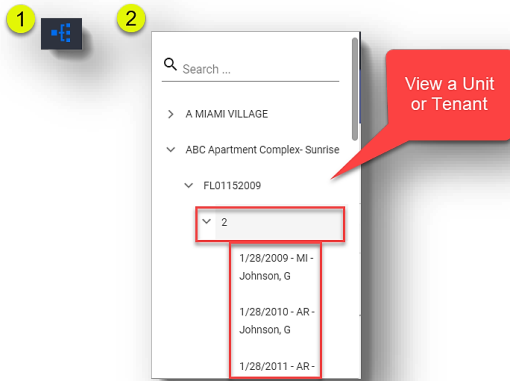
You can create shortcuts to frequently visited work areas by clicking **Favorites**  and selecting the desired area(s) from the drop-down. The star indicates that your option(s) has been saved.





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.

Jane Doe

Profile

Logout

Profile Details

About

Registrant Information

First Name *
Jane

Last Name *
Doe

Email *
jdoe@gmail.com

User Name
HDS_User

Password *

Confirm Password *

Organization Information

Name *
Top Housing Agency

Organizational Role *
Developer

Address *
1122 Sunny Drive

City *
Fl. Lauderdale

State *
Florida

Zip Code *
33007

Phone *
(555)555-5555

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 General , LIHTC and TRACS unit numbers. Selecting an option in the table will redirect you to the Unit > General Information 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**.

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.

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

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 Wrap Text Show all Rows < 1 of 5 >

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	10004	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	10004	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	10004	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	10004	ABC Apartment Complex-Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cert Actions	1-A	1-A		<input type="checkbox"/>	FL 011520009	Building 1	10004	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	10004	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	10004	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	10004	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	10004	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	10004	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	10004	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	10004	ABC Apartment Complex-Sunrise II	All Process Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cert Actions	1-A	1-A		<input type="checkbox"/>	FL 011520009	Building 1	10004	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	10004	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	10004	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	10004	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

Unit Number *
Unit 1

Unit Characteristics


Status
Site Active Inactive Core/Service
Bldg Active Inactive Core/Service
Unit Active Inactive Core/Service

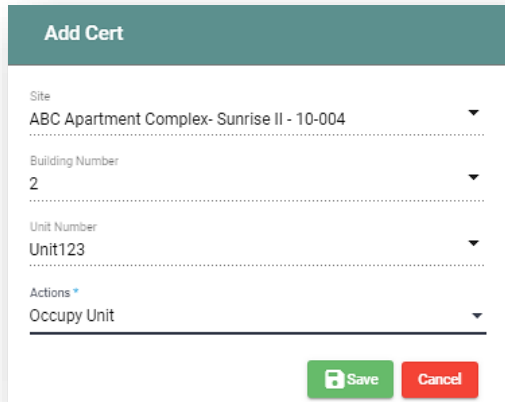
Bedroom Size *
2

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.



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.*



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

Bldg Archived Inactive Out-of-Service

Unit Archived 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 *

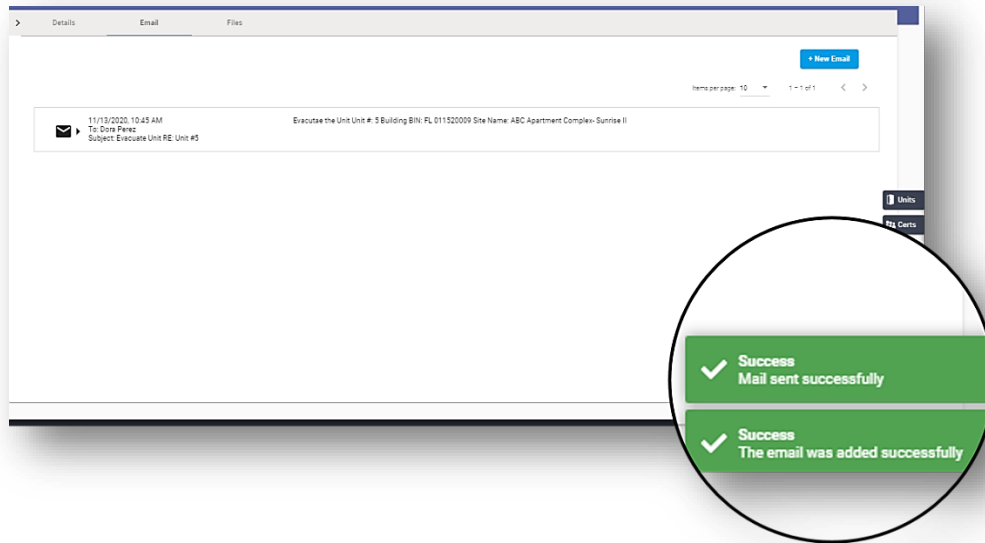
New Unit Added

B I U Normal Normal

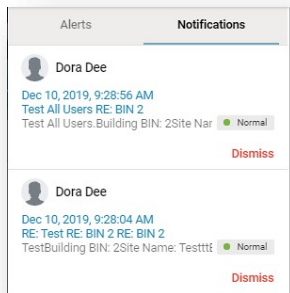
New Unit Added this past Monday!

[Send](#) [Close](#)

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

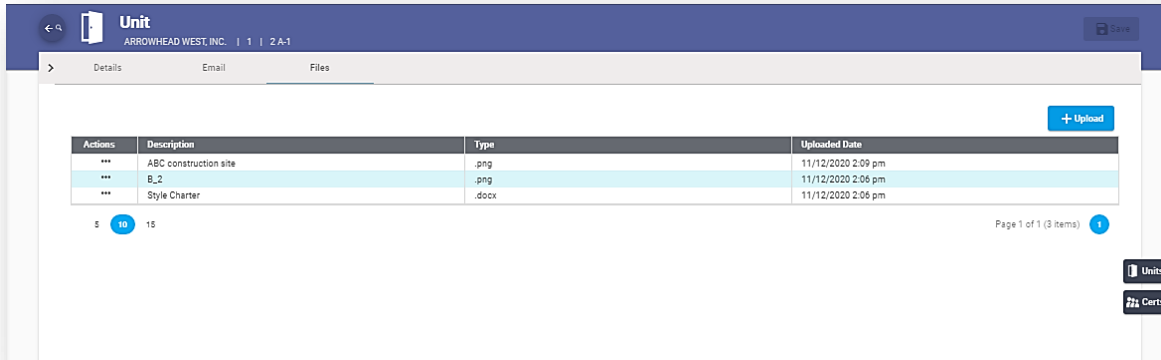


After a(n) email or note is sent, a notification will appear in under **Notifications** on the homepage.




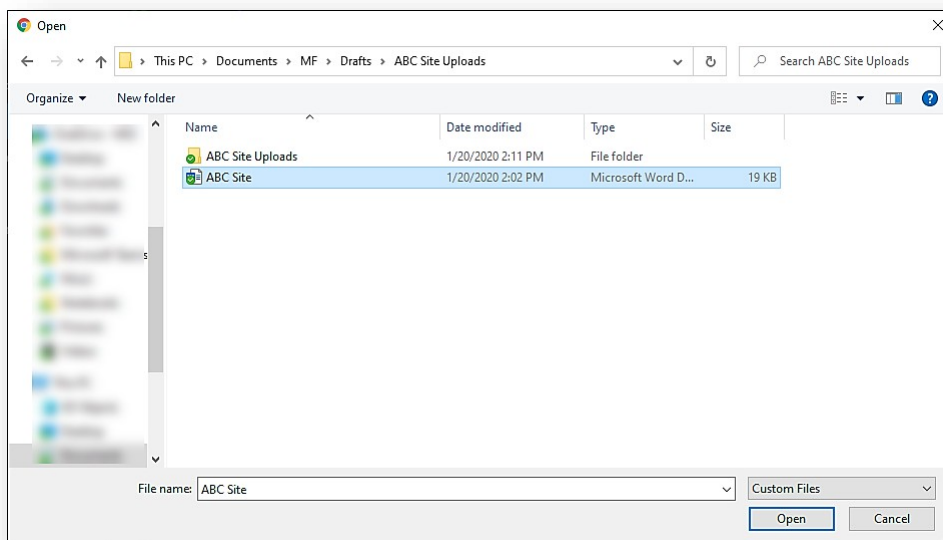
Files

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.

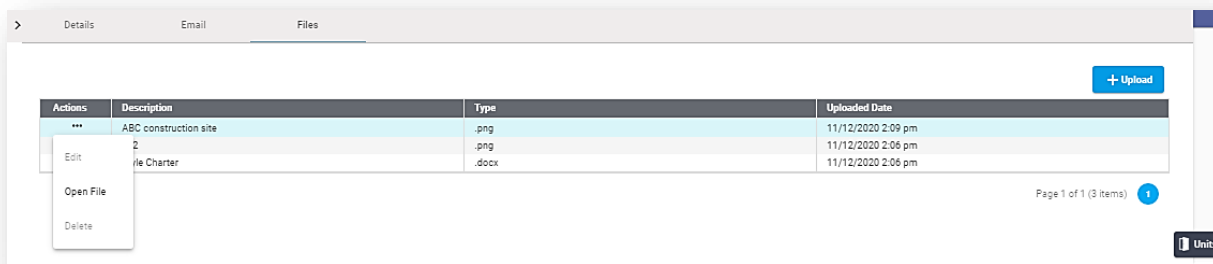


To upload a file:

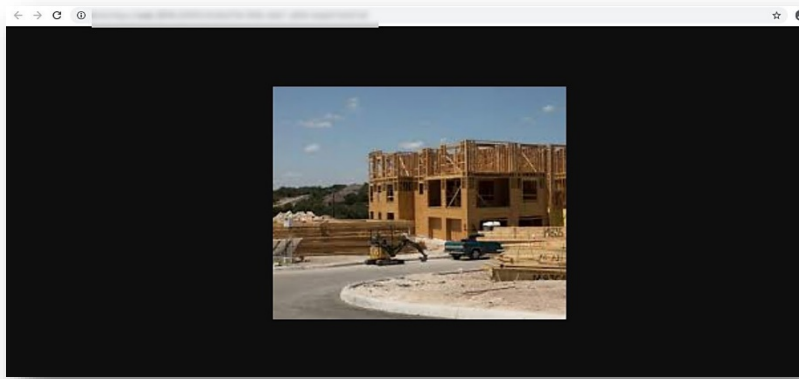
1. Click **Upload** 
2. Choose the file you wish to upload from your directory and click **Open**.



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

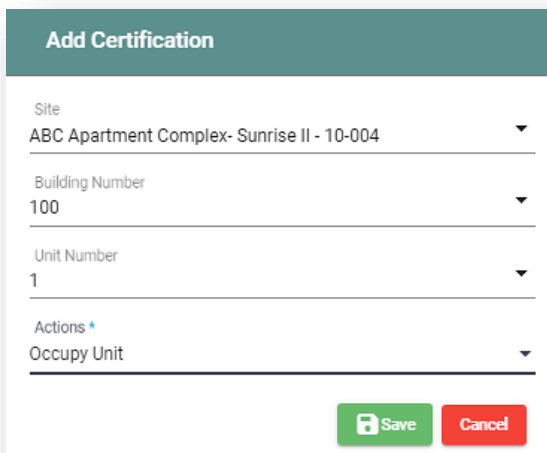
Field/Option	Description/Usage
Details>General Information - <i>General Information</i>	
*Unit Number	Unique number assigned to identify a unit within a building.
Details>General Information - <i>Unit Characteristics</i>	
Status	The current operating state of a site, building, or unit or the state of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

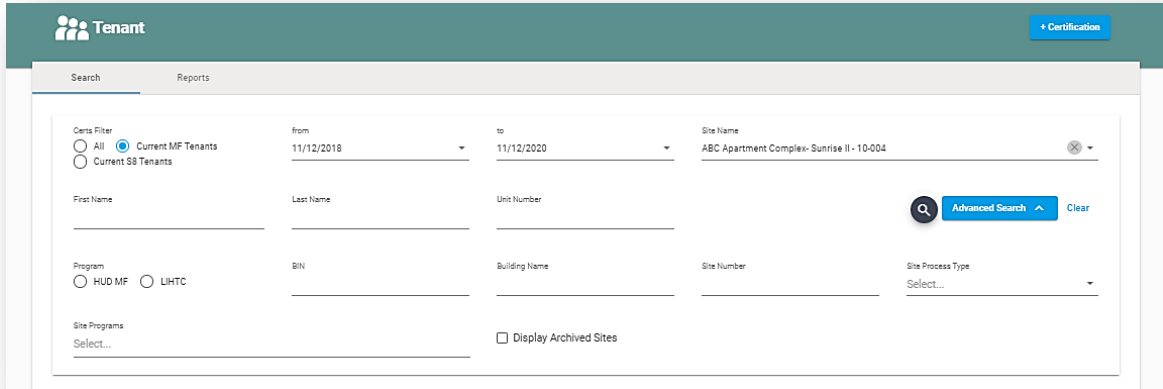



Search

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	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	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	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"/>
	1,4	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 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. 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
---	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"/>
Edc	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	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"/>
---	Text553	LIHTC 553		<input checked="" type="checkbox"/>	2	Text	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 Site Process Type Compliance

Unit Program N/A

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

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 the following sections and data:

- Programs:**

Program	HUD Type	Income Status
Tax Credit	Tax Credit	Calculated
HOME	HOME	<= 50% AMGI
Other	Other	Income Status
- Household:**

Household Members	2	Household Type	Single-Parent Household
Move-In Date	03/01/2019	Social Services	No
Number of Bedrooms	2	Disabled Household	No
Dependents Under 18	0	Occupants 62 and Over	0
Full-Time Students	0		
- Income, Rent and Designations:**

Field	Value	Field	Value
Federal Income Limit	\$ 0.00	Federal Max Rent	\$ 910.00
Most Restrictive Income Designation	60% AMI	Most Restrictive Max Rent	\$ 0.00
Income Averaging Designation	50.00	Gross Rent	\$ 679.00
Most Restrictive Income Limit	\$ 38,620.00	Tenant Paid Rent	\$ 589.55
Total Income From All Sources	\$ 26,156.54	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.



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
Total Income:		\$35,000

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
			\$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:			TOTAL INCOME FROM ASSETS	\$2,500

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 L147C-8/1/2017 MI K561e8t
 Test
 Yuma Senior Terrace | AZ-00-01019 | K56 L147C # K56

DETAILS

Summary | Cert Information | Member Financials | Other Programs

Programs

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

Household

Household Members	2	Household Type	
Move-in Date	9/1/2017	Social Services	
Number of Bedrooms	1	Single-Parent Household	No
Dependents Under 18	0	Disabled Household	No
Full-Time Students	0	Occupants 62 and Over	1

Income, Rent and Designations

Federal (Set Aside)	Most Restrictive Income Designation	Most Restrictive Rent Designation
60% AMI	60% AMI	60% AMI

Income Averaging Designation

Federal Income Limit	\$ 31,260.00	Federal Max Rent	\$ 781.50
Most Restrictive Income Limit	\$ 24,360.00	Most Restrictive Max Rent	\$ 1,005.00
Total Income From All Sources	\$ 9,395.73	Gross Rent	\$ 479.80
		Tenant Paid Rent	\$ 589.55
		Utility Allowance	\$ 79.75
		New 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.*

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

Add to Member List
Cancel

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

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

3. 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:

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

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 **Add New Deduction** +
2. Select a **Member** and **Deduction Type** and enter the **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. 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.

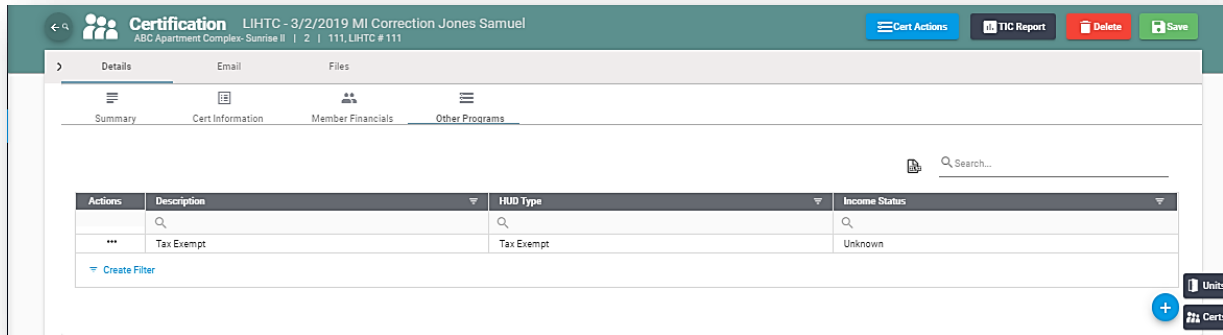
Delete Deduction

Are you sure you want to delete the Deduction ?

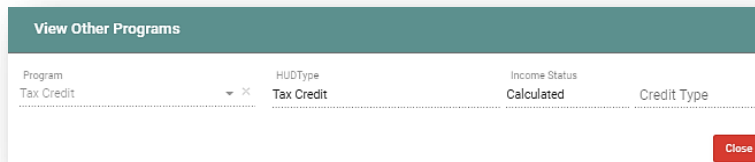
OK
Cancel

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

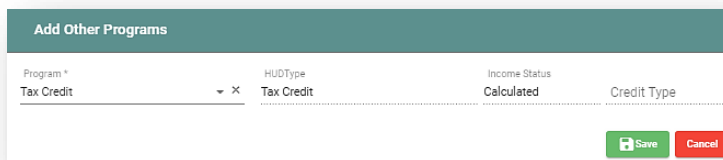


To view a Other Program record, select **View** in the **Actions** menu.



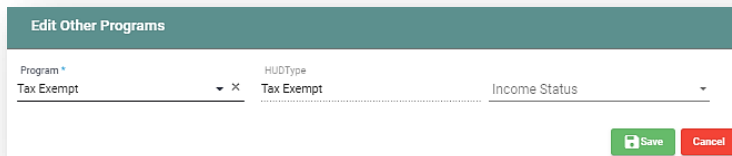
To add Other Program:

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



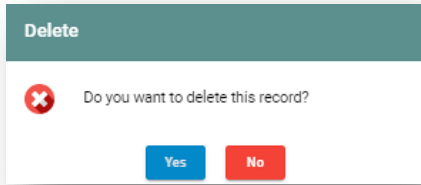
To edit a Other Program record:


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	Medicare
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	Income Averaging	Most Restrictive Income Designation	90% AMI
		Most Restrictive Rent Designation	90% AMI
Income Averaging Designation	20.00		
Federal Income Limit	\$ 10.00	Federal Max Rent	\$ 0.00
Most Restrictive Income Limit	\$ 20.00	Most Restrictive Max Rent	\$ 20.00
Total Income From All Sources		Gross Rent	

Tax Credit Program

Other Programs

Program Tax Credit ▼ ×	HUDType Tax Credit	Income Status 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 <input style="width: 95%;" type="text"/>	Last Name <input style="width: 95%;" type="text"/>	Unit Number <input style="width: 95%;" type="text"/>
Program Select... ▼	LIHTC Unit Number <input style="width: 95%;" type="text"/>	TRACS Unit Number <input style="width: 95%;" type="text"/>
BIN <input style="width: 95%;" type="text"/>	Building Name <input style="width: 95%;" type="text"/>	Site Number <input style="width: 95%;" type="text"/>
Site Name <input style="width: 95%;" type="text"/>	Site Process Type Select... ▼	
		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	E/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	
								Total Income:	
								\$35,000	
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:			TOTAL INCOME FROM ASSETS				\$2,500		

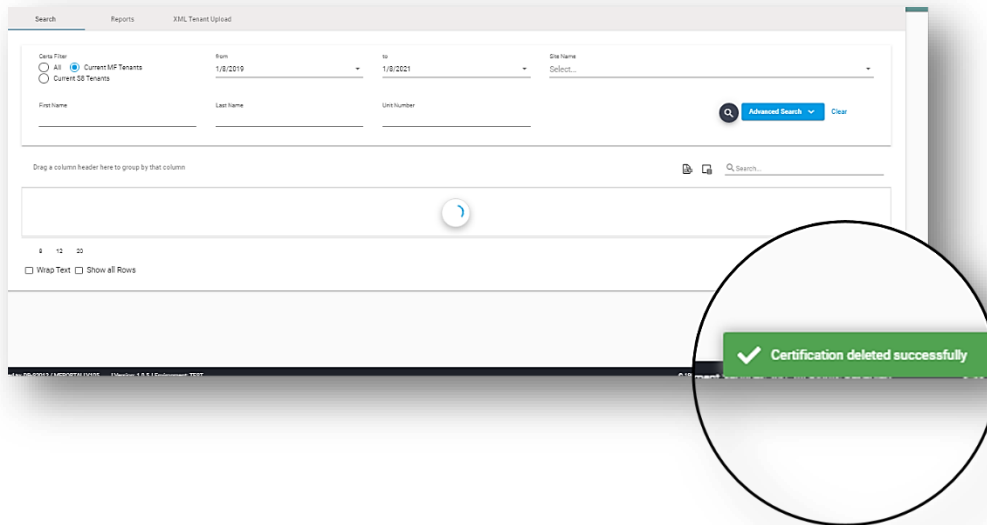
To remove a certification:

1. Click **Delete**

Delete

 Do you want to delete this certification ?

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
Certification>Details>Summary - <i>Programs</i>	
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 - <i>Household</i>	
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 - <i>Income, Rent, and Designations</i>	
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 - <i>Source of Federal Rent Assistance-As reported in the certification</i>	
Federal Rent assistance Amount	As reported in the certification
Certification>Details>Cert Info -<i>Source of Other Non-Federal Rent Assistance-As reported in the certification</i>	
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 - <i>Assets</i>	
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" - <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>
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" - <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 Needs</i>
Employment Type	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>
Unit Type	This is identifying how the unit is being utilized in conjunction to the event that is being transmitted
Number of Occupants	Number of tenants which reside in the unit
Utility Type	Identifies the type of utilities in the unit
Social Services	Identifies what services are provided for the household or tenant. The descriptions are populated from the Social Services Reference Table in the Windows application
Single Parent Household	Identifies the marital status of the Head of Household member

All Student Household	If all household members are full-time students, select Yes . If at least one household member is not a full-time student, select No
Utility Allowance	The amount of monies allocated towards a unit's utility costs which is set by a utility allowance schedule which is published either by HUD, Rural Development or the Public Housing Authority
Student Use Code	If all household members are full-time students, identify the qualifying exception. Enter NA for a household which is not comprised of all full-time students
Certification>Details>Cert Info - Rent Income Certification Details	
Effective Date of Most Recent Income Certification	The Effective Date of the most recent certification of LIHTC income. This is populated when income is not certified, For example, a self-certification
Household Income at Most Recent Income Certification	Household income at the time of the most recent LIHTC qualification date
Household Size at Most Recent Income Certification	The size of the household on the Effective Date of the most recent certification of LIHTC income. This is populated when income is not certified, For example, a self-certification
Certification>Details>Cert Info - Qualification Details	
LIHTC Qualification Date	The most recent qualification date for this event
Household Income at Most Recent Qualification Date	Household income at the time of the most recent LIHTC qualification date
Household Size at Most Recent Qualification Date	Household size at the time of the most recent LIHTC qualification date
Certification>Details>Cert Info - Income, Rent, and Designations	
Federal Set-Aside	The set-aside value from the building LIHTC screen
*Most Restrictive Income	The most restrictive income set-aside percentage currently applied to the household. This value may be the same as or less than the <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 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>
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 -<i>Assistance</i>	
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 - <i>Certification Totals</i>	
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
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 - <i>Project Details</i>	
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.	