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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.
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.

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

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”.
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 🔄.


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.

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.
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.

<table>
<thead>
<tr>
<th>Navigation Tabs</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Units" /></td>
<td>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 &gt; General Information area.</td>
</tr>
<tr>
<td><img src="image" alt="Certs" /></td>
<td>Displays a list of Tenant Certifications for all tenant members which resided in the unit. To view certification details, click on a Tenant Certification.</td>
</tr>
<tr>
<td><img src="image" alt="Priors" /></td>
<td>Displays a list of all previous certifications.</td>
</tr>
</tbody>
</table>
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.

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.

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

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.

   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.
2. 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.
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

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.
**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**
2. Begin typing the recipient’s name and select the correct contact when it is displayed.
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**

<table>
<thead>
<tr>
<th>Field/Option</th>
<th>Description/Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details&gt;General Information - <em>Unit Number</em></td>
<td>Unique number assigned to identify a unit within a building.</td>
</tr>
<tr>
<td>Details&gt;General Information - <strong>General Information</strong></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>The current operating state of a site, building, or unit or the state of the record.</td>
</tr>
<tr>
<td>Bedroom Size</td>
<td>Represents the number of bedrooms in a unit</td>
</tr>
<tr>
<td>Unit Type</td>
<td>Represents the type of unit; for example, efficiency</td>
</tr>
<tr>
<td>Square Footage</td>
<td>Represents the total square footage of the unit.</td>
</tr>
<tr>
<td>Unit Added Date</td>
<td>Represents the date the unit was added</td>
</tr>
</tbody>
</table>
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 button.

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
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**

To create a new certification:

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.

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 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.
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.

“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.
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.
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.
Income

To add an Income:
1. Click **Add Income**
2. Select an option from the **Member** and **Income Type** box and enter the **Amount**.

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

To edit a record:
1. Select **Edit** in the **Actions** column of the desired record.
2. Update the record.
3. Click Save to save the changes.

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

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

Assets
To add new Assets:

1. Click Add New Assets.
2. Select a Member, Asset Type, and Status and enter the Cash Value and Annual Income amounts.
3. Click **Save** to complete your actions.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Member</th>
<th>Type</th>
<th>Status</th>
<th>Cash Value</th>
<th>Annual Income</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>John S Doe</td>
<td>Other</td>
<td>Current</td>
<td>$1,87</td>
<td>$56,548.81</td>
</tr>
<tr>
<td>...</td>
<td>Jane Doe</td>
<td>Other</td>
<td>Current</td>
<td>$1,87</td>
<td>$11,112.00</td>
</tr>
</tbody>
</table>

To edit an Asset:

1. Select **Edit** in the **Actions** column of the desired record.
2. Update the records in the **Edit Asset** box.
3. Click **Save** to complete your actions.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Member</th>
<th>Type</th>
<th>Status</th>
<th>Cash Value</th>
<th>Annual Income</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Jane Doe</td>
<td>Other</td>
<td>Current</td>
<td>$1,87</td>
<td>$11,112.00</td>
</tr>
<tr>
<td></td>
<td>Jane Doe</td>
<td>Checking</td>
<td>Current</td>
<td>$50.00</td>
<td>$20,000.00</td>
</tr>
</tbody>
</table>

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

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

**Deductions**
To add a new Deduction:

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

3. Click **Save** to complete your actions. Note that deductions do not apply to the Tax Credit program.
To edit a Deduction:
1. Click **Edit** in the **Actions** column of the desired record.
2. Update the record in the **Edit Deduction** box.
   - **Member**: Jane Doe
   - **Deduction Type**: Limits
   - **Amount**: $ 200.00

3. Click **Save** to save the changes.

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

**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**

<table>
<thead>
<tr>
<th>Program</th>
<th>HUD Title</th>
<th>Income Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOME</td>
<td>HOME</td>
<td>50% AMI</td>
</tr>
</tbody>
</table>

**Household**
- Household Income: 2
- Household Type: Single Parent/1 adult
- Single Parent: Yes
- Number of Applicants: 0
- Household Size: 2
- Tenants: 0

**Income, Rent, and Deductions**

- **Income**:
  - Federal Income Limit: $10,000
  - Federal Income Support: $0.00

- **Rent**:
  - Federal Rent: $0.00
  - State Rent: $0.00
  - Local Rent: $0.00
Tax Credit Program

**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**.

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

To remove a certification:

1. Click **Delete**

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

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

### Non-Optional Charges
- As reported in the certification

### Wages Total
- The sum of income types B = Business, F = Federal Wage, M = Military Wage, and W = Non-Federal Wage

### Social Sec Total
- The sum of income types PE = Pensions, SI = Supplemental Security Income, and SS = Social Security

### Public Assist Total
- The sum of income types T = TANF (Formerly AFDC) and G = General Assistance

### Other Total
- The sum of income types CS = Child Support, I = Indian Trust, N = Other Non-Wage Source, and U = Unemployment

### Total Income
- As calculated by HDS. Does not include Asset Income

#### Certification>Details>Cert Info - Source of Federal Rent Assistance - As reported in the certification

- **Federal Rent assistance Amount**: As reported in the certification

#### Certification>Details>Cert Info - Source of Other Non-Federal Rent Assistance - As reported in the certification

- **Other Non-Federal Rent Assistance Amount**: As reported in the certification

### Total Monthly Rent Assistance
- The total amount of both federal and non-federal rental assistance

#### Certification>Details>Cert Info - Assets

- **Cash Value**: As reported and as calculated by HDS
- **Asset Income**: As reported and as calculated by HDS

- **Certification Type**: Displays the certification type for the certification. "MI" - Move In, "MO" - Move Out, "TI" - Transfer In, "TO" - Transfer Out, "R" - Recertification, "A" – Adjustment, "IC" – Initial

- **Effective Date**: This is the original date that this compliance event occurred
- **Self-Certification**: Verifies that tenant has self-certified their income
- **Correction**: Verifies if updates have been made to the previous record
- **Original Event Date**: Represents the date the XML file was uploaded, or data entered manually

- **Correction Effective Date**: Date of the certification update
- **Event Created**: Date of the compliance event
- **Old Move-In Date**: The original move in date for the household for which this event is reporting
- **Move-In Date**: Date the tenant moved into the unit

- **Household Type**: Identifies the household category. NA" - Not Applicable, "EL" – Elderly, "FA" – Family, "HO" – Homeless, "RC" – RCAC, "DS" – Displaced, "SN" - Special Needs NA, Elderly, Family, Homeless, RCAC, DS and Special Needs


- **Unit Type**: This is identifying how the unit is being utilized in conjunction to the event that is being transmitted

- **Number of Occupants**: Number of tenants which reside in the unit

- **Utility Type**: Identifies the type of utilities in the unit

- **Social Services**: Identifies what services are provided for the household or tenant. The descriptions are populated from the Social Services Reference Table in the Windows application

- **Single Parent Household**: Identifies the marital status of the Head of Household member
All Student Household

If all household members are full-time students, select Yes. If at least one household member is not a full-time student, select No.

Utility Allowance

The amount of monies allocated towards a unit’s utility costs which is set by a utility allowance schedule which is published either by HUD, Rural Development or the Public Housing Authority.

Student Use Code

If all household members are full-time students, identify the qualifying exception. Enter NA for a household which is not comprised of all full-time students.

Certification>Details>Cert Info - Rent Income Certification Details

Effective Date of Most Recent Income Certification

The Effective Date of the most recent certification of LIHTC income. This is populated when income is not certified, For example, a self-certification.

Household Income at Most Recent Income Certification

Household income at the time of the most recent LIHTC qualification date.

Household Size at Most Recent Income Certification

The size of the household on the Effective Date of the most recent certification of LIHTC income. This is populated when income is not certified, For example, a self-certification.

Certification>Details>Cert Info - Qualification Details

LIHTC Qualification Date

The most recent qualification date for this event.

Household Income at Most Recent Qualification Date

Household income at the time of the most recent LIHTC qualification date.

Household Size at Most Recent Qualification Date

Household size at the time of the most recent LIHTC qualification date.

Certification>Details>Cert Info - Income, Rent, and Designations

Federal Set-Aside

The set-aside value from the building LIHTC screen.

*Most Restrictive Income

The most restrictive income set-aside percentage currently applied to the household. This value may be the same as or less than the Federal Income Designation amount. The values are populated from the unit Type reference table in the Windows application.

*Most Restrictive Rent

The most restrictive rental set-aside percentage currently applied to the household. This value may be the same as or less than the Federal Income Designation amount. The values are populated from the unit Type reference table in the Windows application.

Income Averaging Designation

If the building set-aside is Income Averaging, this field is mandatory for a Tax Credit certification and identifies which unit designation applies: 20%, 30%, 40%, 50%, 60%, 70%, or 80%.

Federal Income Limit

Total amount of income allowed based on the number of individuals in the unit and the income limit assigned to the site and building. Click the icon next to the Federal Income Limit to view the high-water mark.

The system automatically calculates LIHTC income and rent limits based on the high-water mark. The fields which contain an asterisk must be populated for the save button to become enabled.

Federal Rent Limit

The maximum amount of rent which can be allowed based on the number of individuals in the unit and income limit assigned to the property. Click the icon next to the Federal Rent Limit to view the high-water mark. The system automatically calculates LIHTC income and rent limits based on the high-water mark. The fields which contain an asterisk must be populated for the save button to become enabled.

Most Restrictive LIHTC Income Limit

The LIHTC maximum allowable income for the unit based on an Income Designation percentage that is lower than the Federal Income Designation.
<table>
<thead>
<tr>
<th>Most Restrictive LIHTC Rent</th>
<th>The LIHTC maximum allowable income for the unit based on an <em>Income Designation</em> percentage that is lower than the Federal Income Designation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Income</td>
<td>The total of amount reported for the household.</td>
</tr>
<tr>
<td>Gross Rent</td>
<td>Monthly rent including an estimated utility cost and non-optional charges</td>
</tr>
<tr>
<td>Tenant Rent</td>
<td>The rent that the tenant is paying</td>
</tr>
<tr>
<td>Utility Allowance</td>
<td>The amount of monies allocated towards a unit’s utility costs which is set by a utility allowance schedule which is published either by <em>HUD, Rural Development</em> or the <em>Public Housing Authority</em></td>
</tr>
<tr>
<td>Non-Optional Charges</td>
<td>The amount of non-optional charges, such as mandatory garage rent, storage lockers, charges for services provided by the development</td>
</tr>
</tbody>
</table>

**Certification > Details > Cert Info - Assistance**

<table>
<thead>
<tr>
<th>Sources of Federal Rent Assistance</th>
<th>The program under which the federal subsidy portion of rent is being paid. If applicable, select a description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Rent Assistance Amount</td>
<td>The Federal rental subsidy amount</td>
</tr>
<tr>
<td>Source of Other Non-Federal Rent Assistance</td>
<td>The program under which the non-federal subsidy portion of rent is being paid</td>
</tr>
<tr>
<td>Other Non-Federal Rent Assistance</td>
<td>The non-federal portion of the rent paid by a third party such as a housing authority</td>
</tr>
<tr>
<td>Total Monthly Rent Assistance</td>
<td>The total amount of both federal and non-federal rental assistance</td>
</tr>
</tbody>
</table>

**Certification > Details > Cert Info - Certification Totals**

<table>
<thead>
<tr>
<th>Wages Total</th>
<th>The sum of income types B = Business, F = Federal Wage, M = Military Wage, and W = Non-Federal Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Sec Total</td>
<td>The sum of income types PE = Pensions, SI = Supplemental Security Income, and SS = Social Security</td>
</tr>
<tr>
<td>Public Assist Total</td>
<td>The sum of income types T = TANF (Formerly AFDC) and G = General Assistance</td>
</tr>
<tr>
<td>Other Total</td>
<td>The sum of income types CS = Child Support, I = Indian Trust, N = Other Non-Wage Source, and U = Unemployment</td>
</tr>
<tr>
<td>Asset Cash Value Total</td>
<td>The total of the asset values</td>
</tr>
<tr>
<td>Annual Asset Income Total</td>
<td>Total amount of other assistance received by the household</td>
</tr>
</tbody>
</table>

**Certification > Details > Cert Info - Project Details**

<table>
<thead>
<tr>
<th>Project ID</th>
<th>Site Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Name</td>
<td>The name of the site which the XML has been uploaded to</td>
</tr>
<tr>
<td>XML Upload Vendor Name</td>
<td>Displays the name of the software the management company used to create the file such as Real Page, Boston Post etc.</td>
</tr>
<tr>
<td>XML Upload Created Date</td>
<td>The date the file was created</td>
</tr>
<tr>
<td>XML Upload Reporting Start Date</td>
<td>The beginning date of the date range for the transmission file</td>
</tr>
<tr>
<td>XML Upload Reporting End Date</td>
<td>The ending date of the date range for the transmission file</td>
</tr>
<tr>
<td>XML Upload NAHMA Version</td>
<td>The system only accepts versions 5.0 and 6.0.</td>
</tr>
</tbody>
</table>

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.