

CERTIFICATION PORTAL

HOW-TO GUIDE

January 2023

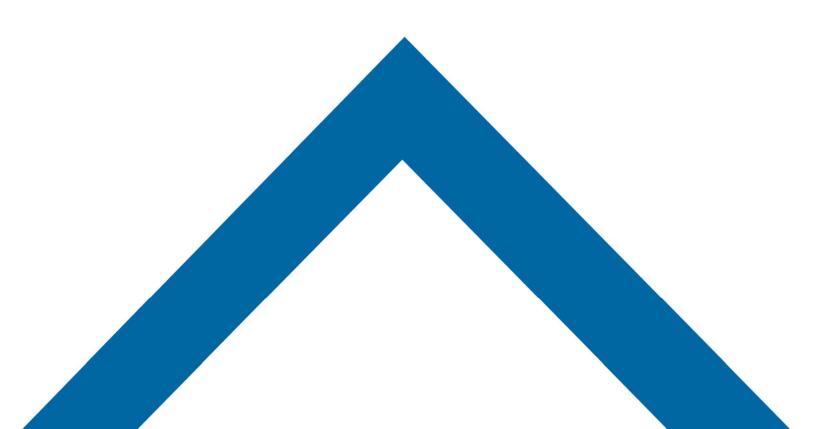


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LEGEND

ñ	Return to the Landing Page (Snapshot)
Y	Search or Sort
3	Undo, Clear search
Q	Review/Select
₽ Save	Save entry
Save & New	Save entry and create additional entries
Save & Close	Save entry and close screen
Edit	Make changes
Cancel	Delete entry and go back to previous screen
III	Export to Excel
	Export to Word
<u> </u>	Submit to Agency
×	Delete Record
=	Print
•	Notes
@	Open E-Mail

SECTION 1 LOGGING IN

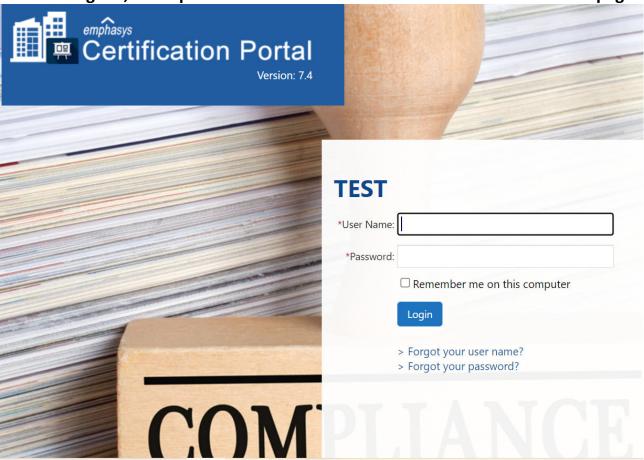
New (Super) User

If you are a new user who will have full control (Super User) of the CP system, the Agency will provide you a User ID and Password.

New Non-Super User

If you are a new user (On-Site Manager), the Super User will set up your User ID, Password and assign specific projects to you. Contact your Super User for log in credentials.

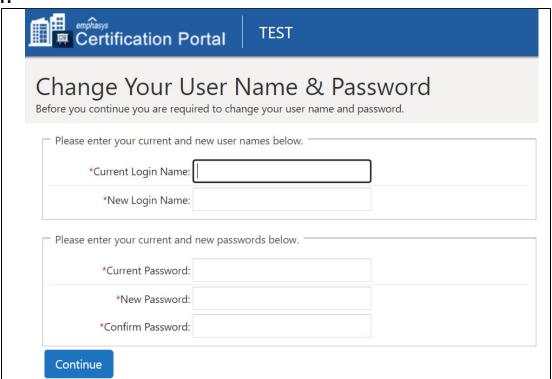
✓ At initial sign in, enter provided User ID and Password at the SYSTEM LOGIN page.



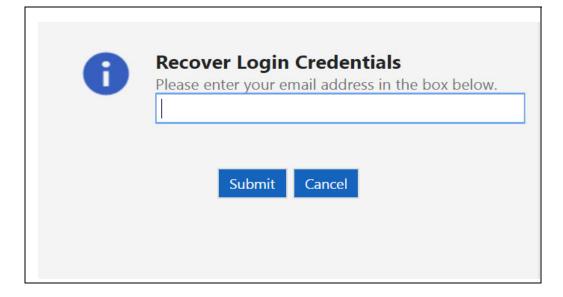
ALL NEW USERS

User will be required to create a new User ID and Password.

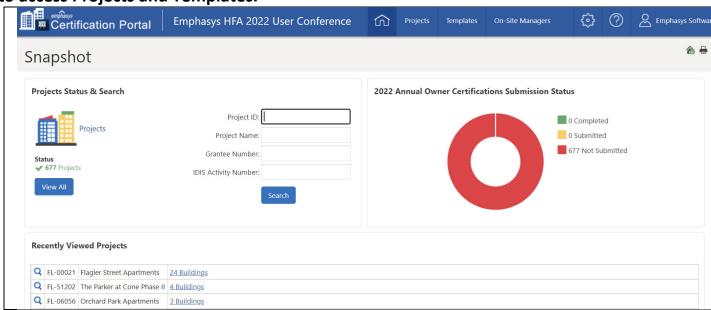
NOTE: Credentials could require specific characters and number of characters as set by the Super User.



Existing Users can recover credentials by clicking > Forgot your user name? and enter e-mail address and click

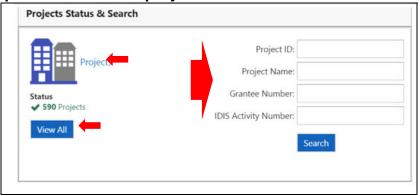


Once new credentials are created and logged in, user will see the SNAPSHOT (Landing Page) to access Projects and Templates.



SECTION 2 ACCESSING PROJECTS

There are various options to access a project:



Option 1: Click on View All This will list all projects in the system.



Option 2: Click on Projects

This will list all projects in the system.

Options 1 & 2 will take the user to this screen.



Click to search for a specific project. Enter Project Number or Project Name.



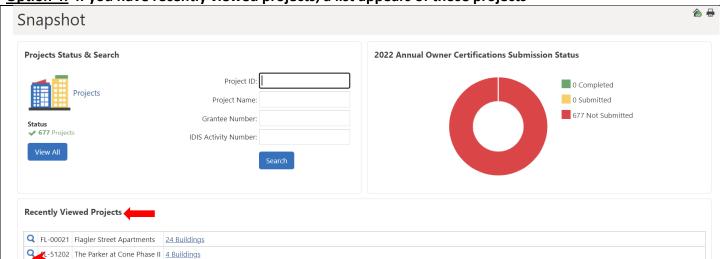
Option 3: Enter Project ID and/or Project Name and/or Grantee Number and/or IDIS Activity Number (HOME). Using this method requires the entries to be exact, i.e., spelling, dashes, etc.



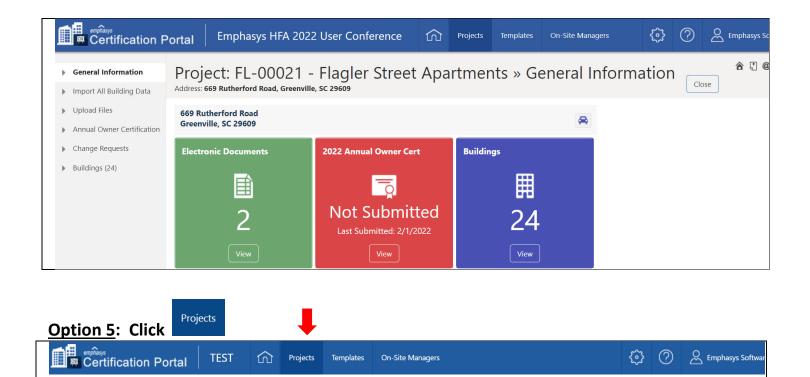
Click Search This option will take the user to this screen.



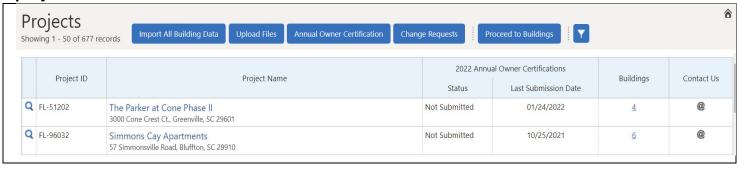
Option 4: If you have recently viewed projects, a list appears of those projects



Click on a next to desired project. This option will take the user to this screen below.



The user will see a list of projects that have been assigned them. The Super User sees all projects.



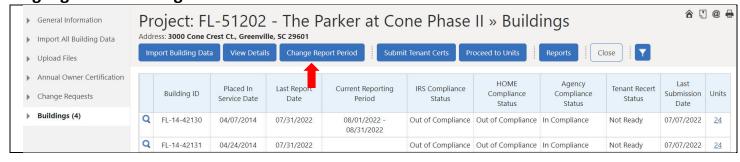
SECTION 3 MANUAL ENTRY - NEW MOVE IN

Highlight the project to work in. Click

Proceed to Buildings



Highlight the building to work in. Click Change Report Period



Enter the Reporting Period for the applicable period. To update the reporting period for all

buildings in the project, check the box Update All Buildings and click



Highlight the Building to work in and click

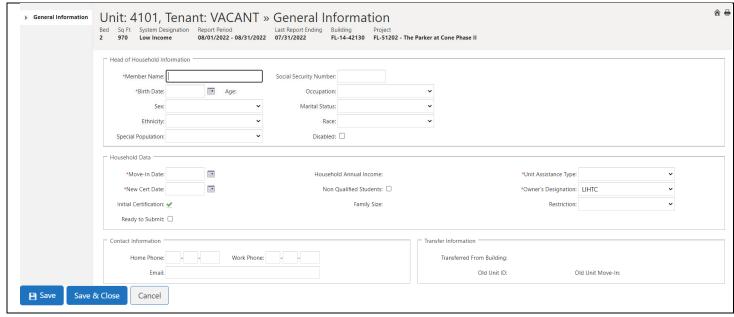
Proceed to Units



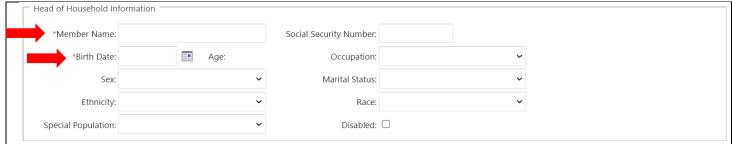
Highlight the unit for data input and click New Tenant Cert



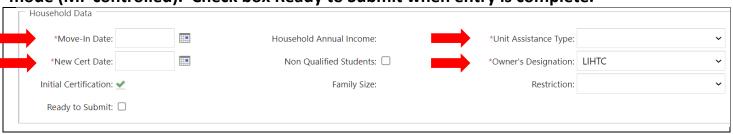
Complete all system required fields (*) and any others required by the Agency.

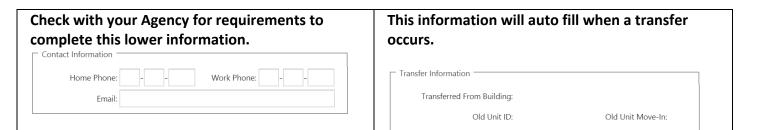


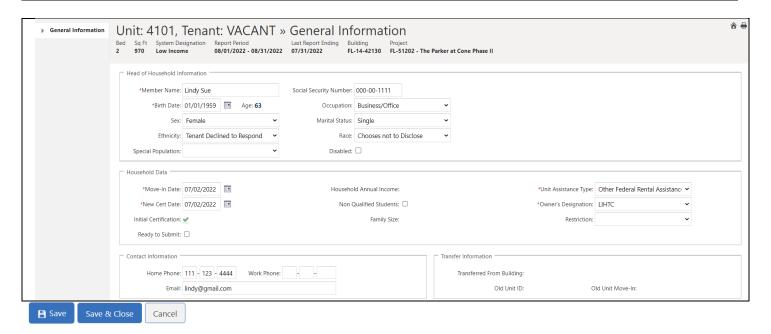
Enter required (*) and all applicable data required by the Agency.



Enter required (*) and all applicable data. Check Non-Qualified Student if household has students that do not meet any exceptions (HOME and/or LIHTC). Initial Certification box will automatically check for all Initial Certifications. Family size and Household Annual Income will auto fill when family data is entered in detail mode or enter on this screen if in summary mode (MF controlled). Check box Ready to Submit when entry is complete.

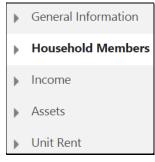






Click when done with the page or Save & Close when ready to move to next unit.

After clicking and the project is set up in Detail Mode, a menu will open on left side of screen for entering additional household data.

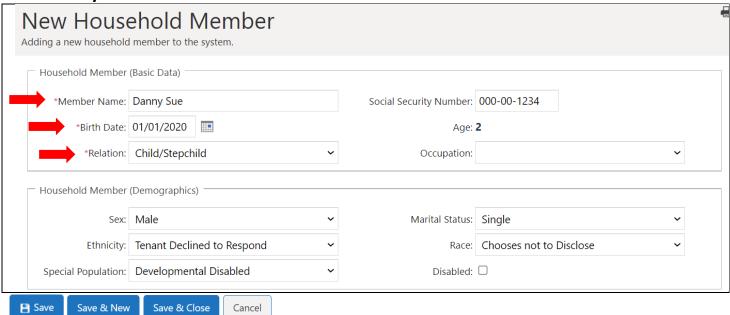


If more than one household member, click Household Members to add all (adults, minors, unborn child, etc.) additional members.

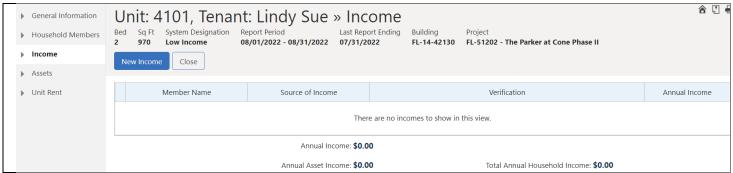


Click New Member and complete all system required fields (*) and any others required by the Agency. Check with the Agency for other required fields.

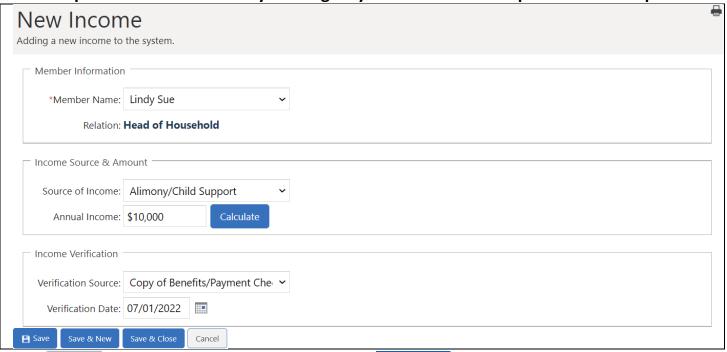
Click when done with the page or when ready to move to next screen.



To add all household income, click Income on the menu on the left side of the screen.



Click New Income to enter household income by Member Name. All boxes with down arrows have drop down selection. Verify with Agency which fields are required to be completed.



Click when done with Income entries or Save & New to add additional Incomes or when ready to move to next screen.

User can click on calculate Calculate to have system calculate each earned income. Enter Pay Rate, Frequency, Hours per Year and the system will calculate the Annual Income for each source entered. For each income to calculate, user will need to click Apply. The calculated incomes will populate the Annual Income box.

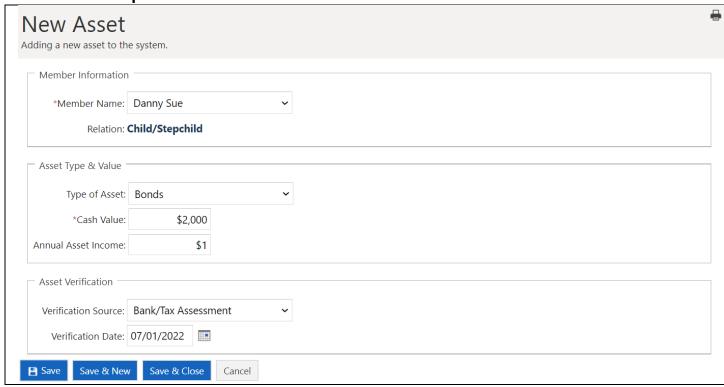


Once all incomes have been entered and saved, the main tenant screen will show a calculated Annual Income from all incomes entered.

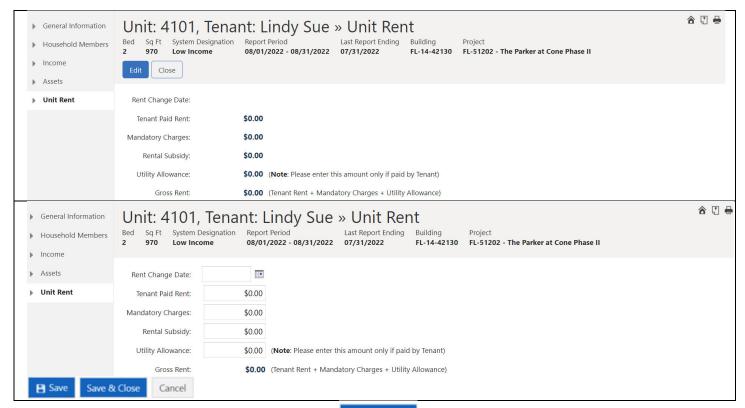


To add all household Assets, click Assets on the menu on the left side of the screen.

Click on New Asset to enter household asset data by Member Name. Fields with down arrows have drop down selections.



To enter rent data, click Unit Rent on the left side of the screen. Click to access Rent fields.



When all data is entered for a unit, click

to return to Unit list.

NOTE: Rent Change Date:

<u>DO NOT</u> enter a Rent Change Date except in cases where an increase or decrease occurred at a time other than recertification that changes the tenant paid portion (TPP)., i.e. add new subsidy, remove subsidy, utility allowance changes, etc.

Tenant Paid Rent:

This is the actual amount the tenant pays (TPP) for rent.

Mandatory Charges: These are non-optional charges that the tenant must pay and are a condition of occupancy (i.e., garage rental, cable, etc.)

Rental Subsidy: This is the amount of subsidy the tenant is receiving for rental assistance (i.e., Section 8 voucher or other government rental assistance).

Utility Allowance: This amount reflects what has been provided by the local PHA or an Agency approved allowance.

Gross Rent: If tax credit only Gross Rent will include Tenant Paid, Mandatory Charges, and Utility Allowance. If HOME/TC or HOME only it will include all fields.

SECTION 4

MANUAL ENTRY RECERTIFICATION

(Similar to Initial Move-Ins)

Highlight the project and Proceed to Buildings

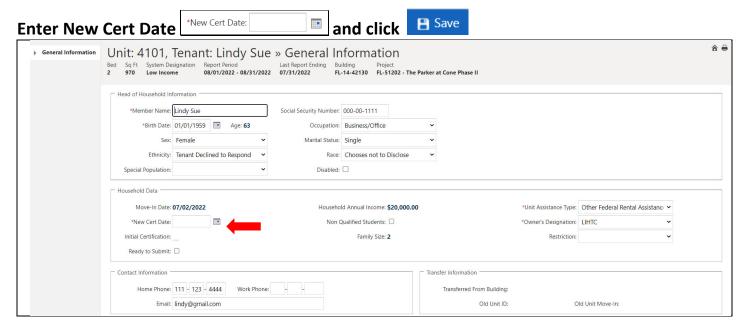
User can also access buildings by clicking on the blue link under the Buildings column.



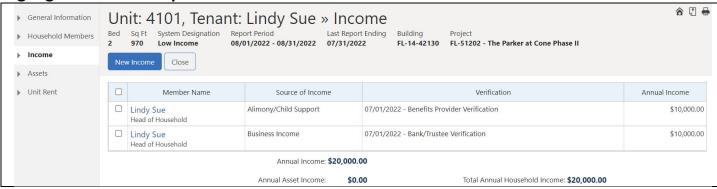
Highlight the building then click Proceed to Units. User can also access units by clicking the blue link under the Units column.



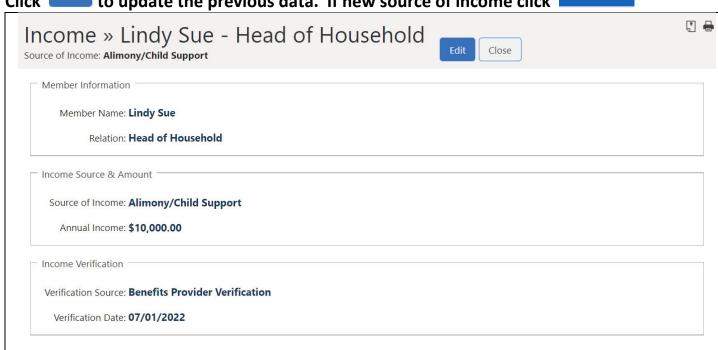




Highlight the unit to open the record



Click to update the previous data. If new source of income click

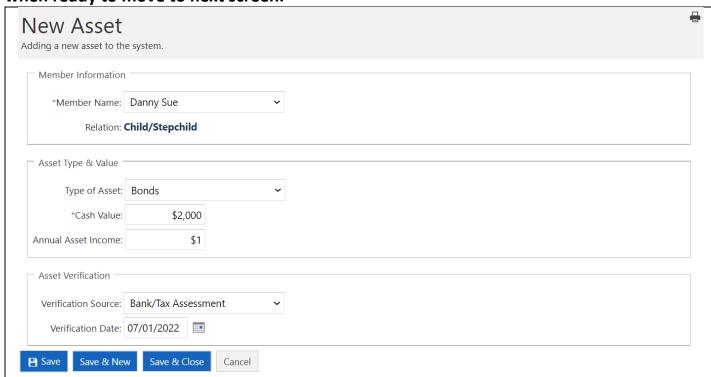


Click when done with Income entry or Save & New to add additional Incomes or when ready to move to next screen.

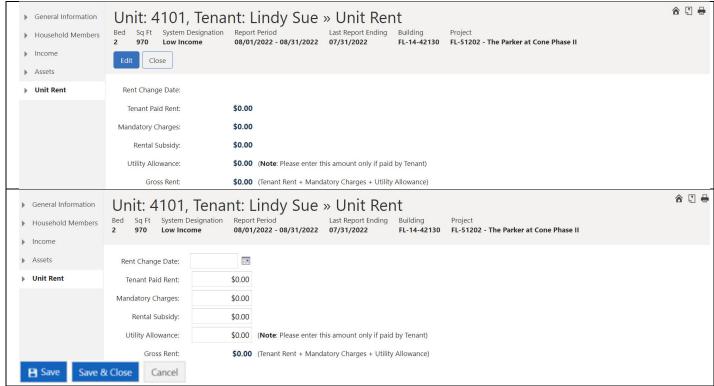


To add/update all household Assets, click on the menu on the left side of the screen. Click to update the previous data. If new source of asset click New Asset

Click Save when done with Asset entry or Save & New to add additional Assets or Save & Close when ready to move to next screen.

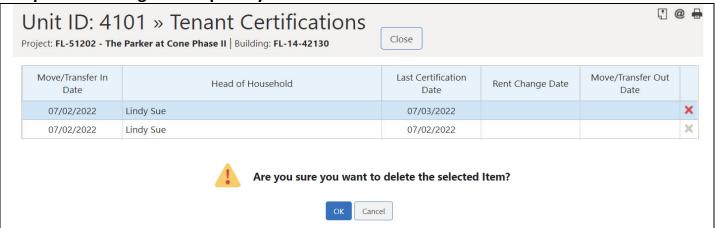


To enter rent data, click Unit Rent on the left side menu. Click to access Rent fields and update record as needed.

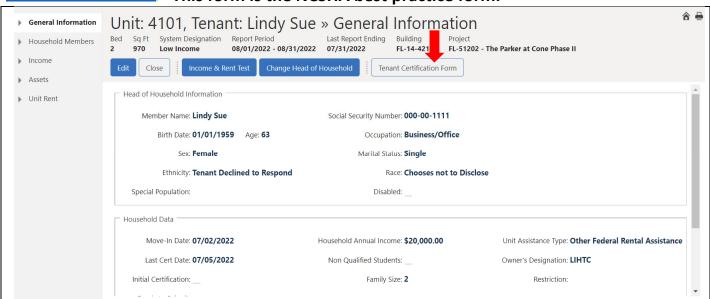


Delete Tenant Certs

If a date of certification/recertification, move in or transfer was entered incorrectly, select the unit, and click Delete Tenant Certs by clicking is to remove the incorrect entry. Only the entry with is can be deleted. When more than one entry has a is delete must be completed starting from top entry.



- This form is the NCSHA best practice form.



As long as a unit has not been submitted/posted, it is editable. Click (to open the record.



Click to open the record for correction.

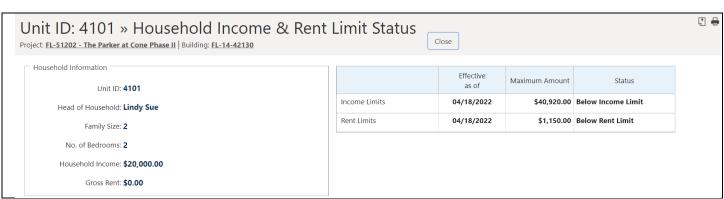


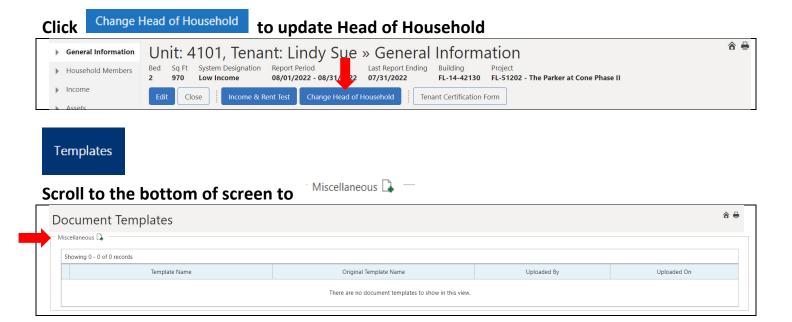
Certain data is now editable.



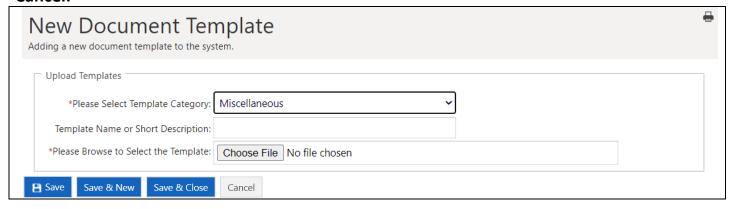
Income and Rent Test can be accessed to check tenant data with the applicable income/rent limits prior to submission.







Click Name the Template > Choose File from user computer. Select applicable Save or Cancel.



SECTION 5 MANUAL UNIT TRANSFER

- Within Same Building (If only one building or 8609 elections, when project has multiple buildings and owner elected to treat buildings as single buildings)
- 2. Between Buildings (Multiple Building Project 8609 Election Yes)

NOTE: Unit Transfers cannot occur on the same day. If the unit being transferred into moved out the same day as the new transfer in, you will need to enter the previous day as the move out date in the unit being transferred into.

TRANSFER WITHIN SAME BUILDING



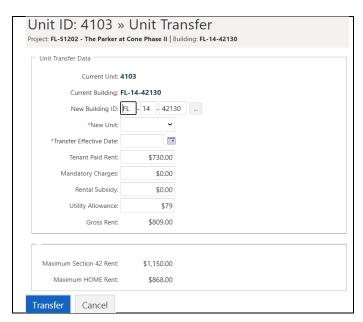


Highlight the building and click Proceed to Units



Highlight the unit that is transferring OUT and click Unit Transfer

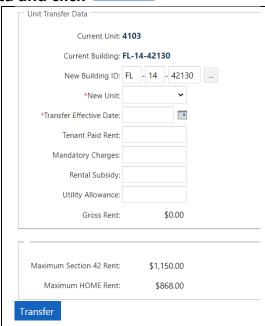




This box will only appear if Multiple Building was elected on the 8609 New Building ID: FL. 14 | 42130 and transfers are allowed between buildings. The ampersand will show available buildings in the project.

Select New Unit (The dropdown box will only show units that are Vacant) and enter Transfer Effective Date.

Enter all other applicable data and click Transfer



SECTION 6 MANUAL MOVE OUT

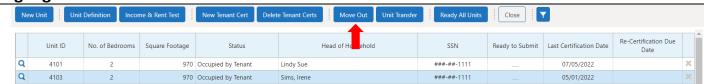
Highlight the project and click Proceed to Buildings



Highlight the building and click Proceed to Units



Highlight the unit to Move Out and click Move Out



Enter Move Out Date as required, and Eviction data is optional when it applies. Click

Move Out

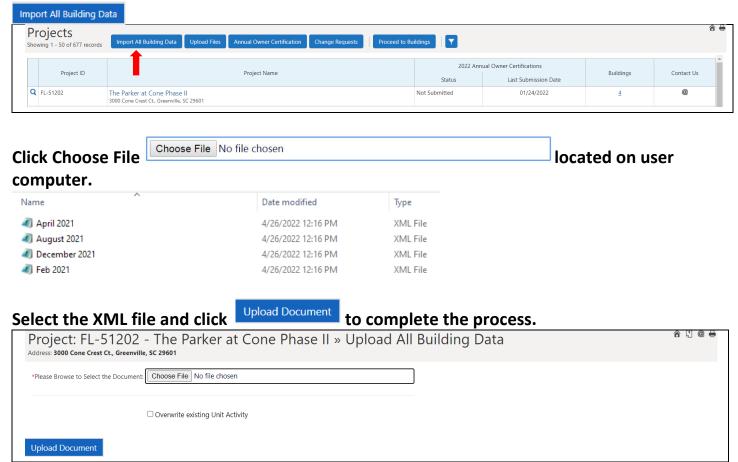


SECTION 7 3RD PARTY SOFTWARE TENANT DATA IMPORT

- 1. All Buildings One File
- 2. Single Buildings Multiple Files (based on number of buildings in project)

UPLOADING ALL BUILDING XML FILE

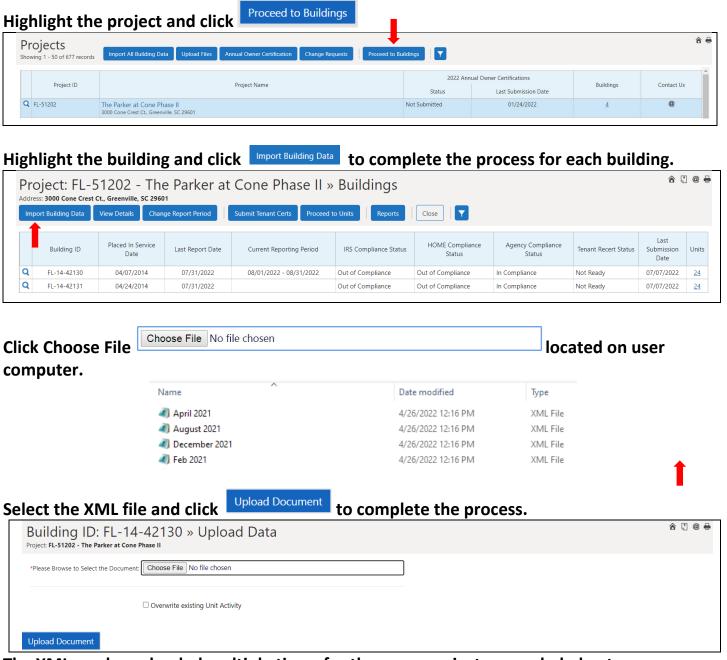
Some 3rd party software programs (i.e., Yardi, RealPage, etc.) create an XML file that includes tenant data for <u>all buildings</u> in the project, highlight the project and click



Documents can be uploaded multiple times for the same project as needed, due to errors. After the initial upload, any subsequent uploads, you must check the box

Overwrite existing Unit Activity

<u>UPLOADING SINGLE BUILDING(S)</u> – Even when multiple building in the project. If the third-party vender makes a separate XML file for each building in the project, user can go to the Building Screen to upload the buildings individually.



The XML can be uploaded multiple times for the same project as needed, due to errors. After the initial upload, any subsequent uploads, you must check the box

Overwrite existing Unit Activity

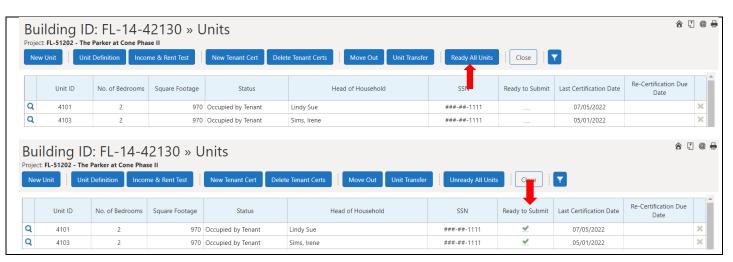
Continue this process until all buildings have been uploaded.

Once all data has been uploaded and reviewed, click Proceed to Units for each building.

and click on

Ready All Units



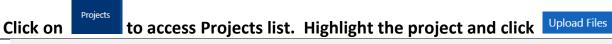


SECTION 8

Download and Upload Forms

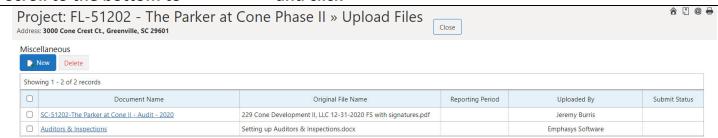
Annual and Inspection Documents

UPLOAD COMPLETED FILES (Documents)

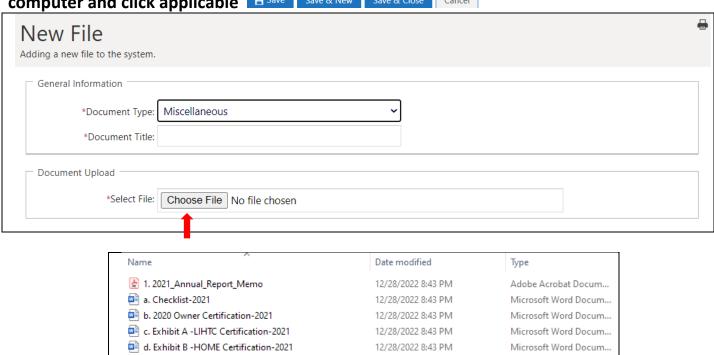




Scroll to the bottom to Miscellaneous and click



Document Type will be Miscellaneous. Enter a Document Title. Choose File from user computer and click applicable Bave Save & New Save & Close



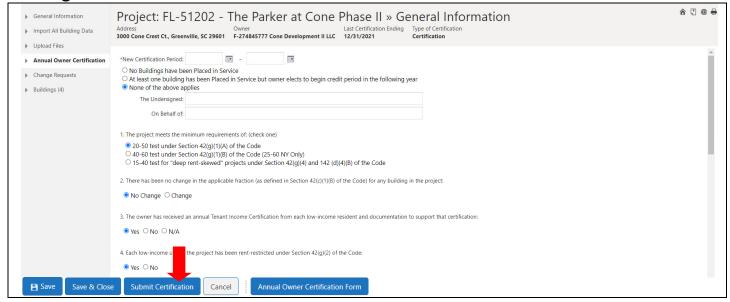
Microsoft Word Docum..

e. Exhibit C -LIHTC Qualified Nonprofit Certification-2... 12/28/2022 8:43 PM

SECTION 9 ANNUAL OWNER CERTIFICATION

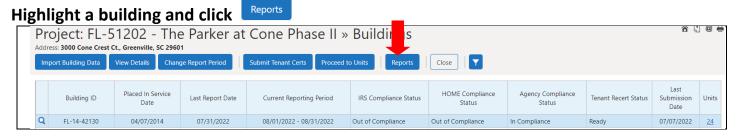


This is the NCSHA best practice form. There are a total of 16 questions and the system default all radio buttons to In Compliance options. Complete the form based on the property status and click Annual Owner Certification to print the document. Click applicable Save option and/or Submit Certification to auto send it to the Agency. This page must be submitted before the buildings can be submitted.

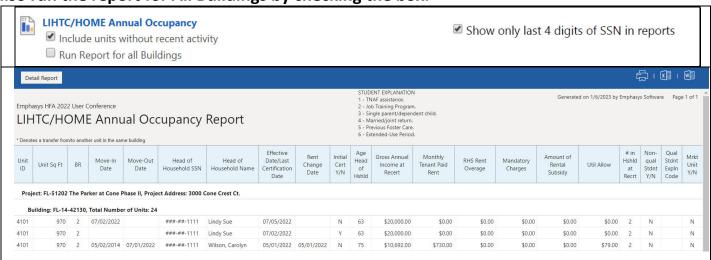


SECTION 10 REVIEWING DATA AND SUBMITTING TO AGENCY

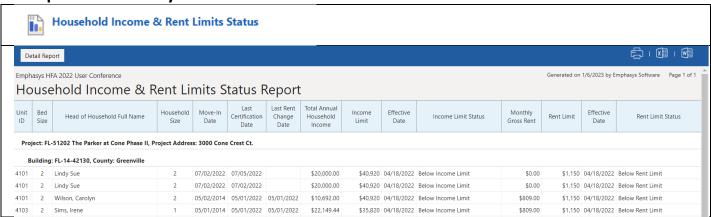
REVIEWING UNIT DATA. This is highly recommended before submitting to Agency to verify all data entries are correct.



This report will only list any unit that has data entered in the applicable reporting period. If user wants to see all units, check the box to Include Units without recent activity. User can also run the report for All Buildings by checking the box.



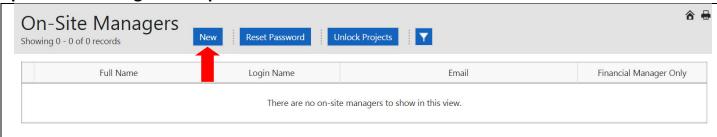
This report will identify the status of Income and Rent for all units entered.

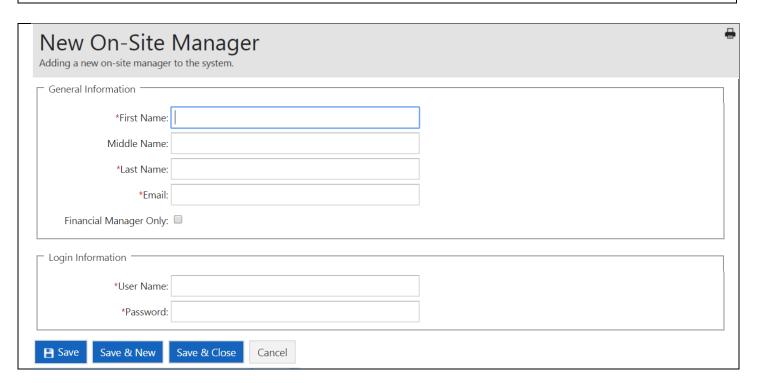


SECTION 11 MANAGEMENT CONTROLS (SUPER USER)



To create On-Site Managers, click and enter required data. Select applicable Save option. All managers set up in this screen will show in a list here.

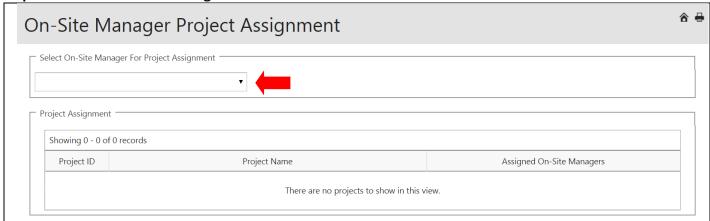


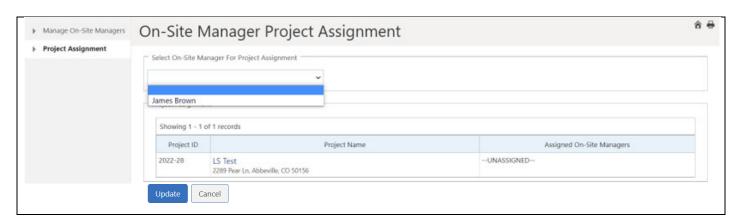


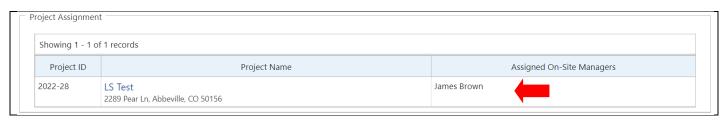


Project Assignment

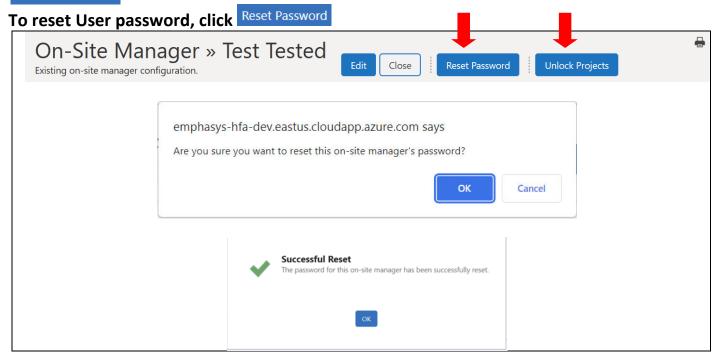
Drop down menu to find Manager name.





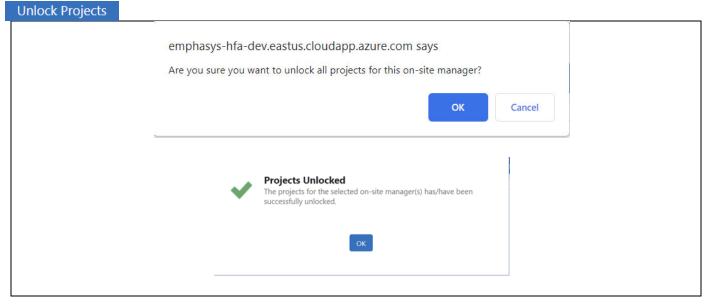


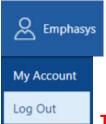
Reset Password



Unlock Projects

There are times when a manager is working in a project and may lose connection with the system which can cause the last project worked in to lock where no user can access it. To unlock the project, click





To end your session and have data remain secure, use the LOG OUT button.