



HDS NextGen Multifamily User Guide

October 02, 2020

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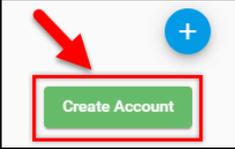
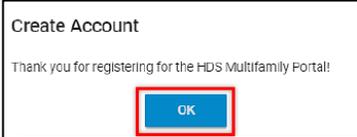
1. Registering and Navigating

Users will follow this procedure to register and log into the HDS NextGen Multifamily portal. This section includes details about the system's navigation tools and instructions on how to generate an occupancy and demographics report.

1.1. Registration

Step	Action
1	Access the HDS NextGen login page at hdsweb.vhda.com . Note: Google Chrome is the required browser to access the system.
2	To create an account, select Click here to create one . <div data-bbox="699 722 1011 1136" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> </div>
3	Click Account Type . <div data-bbox="532 1224 1175 1369" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> </div> <p>Select Compliance User.</p> <div data-bbox="613 1438 1096 1575" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <input type="checkbox"/> Asset Management User <input checked="" type="checkbox"/> Compliance User </div>

Step	Action														
4	<p>Fill in the Registrant Information and Organization Information.</p> <div data-bbox="513 306 1195 630" style="border: 1px solid black; padding: 5px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-bottom: 1px solid black;">Registrant Information</td> <td style="width: 50%; border-bottom: 1px solid black;">Organization Information</td> </tr> <tr> <td style="border-bottom: 1px solid black;">First Name *</td> <td style="border-bottom: 1px solid black;">Name *</td> </tr> <tr> <td style="border-bottom: 1px solid black;">Last Name *</td> <td style="border-bottom: 1px solid black;">Organizational Role * ▼</td> </tr> <tr> <td style="border-bottom: 1px solid black;">Email *</td> <td style="border-bottom: 1px solid black;">Address *</td> </tr> <tr> <td style="border-bottom: 1px solid black;">User Name *</td> <td style="border-bottom: 1px solid black;">City *</td> </tr> <tr> <td style="border-bottom: 1px solid black;">Password *</td> <td style="border-bottom: 1px solid black;">State * ▼ Zip Code *</td> </tr> <tr> <td style="border-bottom: 1px solid black;">Confirm Password *</td> <td style="border-bottom: 1px solid black;">Phone *</td> </tr> </table> </div>	Registrant Information	Organization Information	First Name *	Name *	Last Name *	Organizational Role * ▼	Email *	Address *	User Name *	City *	Password *	State * ▼ Zip Code *	Confirm Password *	Phone *
Registrant Information	Organization Information														
First Name *	Name *														
Last Name *	Organizational Role * ▼														
Email *	Address *														
User Name *	City *														
Password *	State * ▼ Zip Code *														
Confirm Password *	Phone *														
5	<p>To request access to a site, click the New icon.</p> <div data-bbox="537 720 1175 879" style="border: 1px solid black; padding: 5px;"> <p style="margin: 0;">Request Site Access</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="width: 10%; border-bottom: 1px solid black;">Actions</th> <th style="width: 60%; border-bottom: 1px solid black;">Site Name</th> <th style="width: 30%; border-bottom: 1px solid black;">Site Number</th> </tr> </thead> <tbody> <tr> <td colspan="3" style="text-align: center; padding: 5px;">No data</td> </tr> </tbody> </table> <div style="text-align: right; margin-top: 5px;">  </div> </div> <p>Fill in the Site Name and Site Number then click Add Site.</p> <div data-bbox="690 945 1021 1157" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <div style="border-bottom: 1px solid black; padding-bottom: 5px;">Add Site</div> <div style="border-bottom: 1px solid black; padding: 5px 0 5px 20px;">Site Name</div> <div style="border-bottom: 1px solid black; padding: 5px 0 5px 20px;">Site Number</div> <div style="text-align: right; margin-top: 5px;"> Add Site </div> </div> <p>Note: Users aren't required to select a site.</p>	Actions	Site Name	Site Number	No data										
Actions	Site Name	Site Number													
No data															
6	<p>Select View EULA to review the <i>End-User License Agreement</i>, then click the check box to agree to its terms and conditions.</p> <div data-bbox="618 1314 1092 1392" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <div style="display: flex; align-items: center; gap: 10px;"> <input checked="" type="checkbox"/> I agree to EULA terms and conditions. View EULA </div> </div>														

Step	Action
7	<p>Click Create Account.</p> <div data-bbox="737 306 972 455" style="text-align: center;">  </div> <p>Click OK.</p> <div data-bbox="675 522 1032 659" style="text-align: center;">  </div> <p>Note: Your request will be sent for approval. When your request has been approved, you will receive an email notification instructing you to log into the system with the username and password that you provided at registration.</p> <div data-bbox="459 789 1252 1171" style="border: 1px solid black; padding: 5px;"> <p>From: wcmadmin@vhda.com <wcmadmin@vhda.com> Sent: Wednesday, September 2, 2020 4:28 PM To: [REDACTED] Subject: Multifamily Portal Email Notification</p> <p>Dear [REDACTED],</p> <p>Your registration to the HDS Multifamily Portal has been approved by Virginia Housing. Login with the username and password you provided at registration.</p> <p>Thank you!</p> <p>This message was auto-generated by the HDS Multifamily Portal.</p> </div>

1.2. Logging In

Step	Action
1	<p>Access the HDS NextGen login page at hdsweb.vhda.com.</p> <p>Note: Google Chrome is the required browser to access the system.</p>

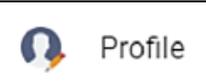
Step	Action
2	<p>Enter your Username and Password.</p> <div data-bbox="657 304 1052 653" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;">  </div> <p>Note: If you have forgotten your username or password, click Trouble Signing In? and enter the requested information to retrieve your user ID or to reset your password.</p> <div data-bbox="617 751 1092 968" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Username *</p> <p>_____</p> <p>Password *</p> <p>_____</p> <p><input type="checkbox"/> Remember Me Trouble Signing In?</p> </div>
3	<p>View the End-User License Agreement (EULA) and select the check box to agree to the terms and conditions.</p> <div data-bbox="683 1085 1024 1419" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Username *</p> <p>_____</p> <p>Password *</p> <p>_____</p> <p><input type="checkbox"/> Remember Me Trouble Signing In?</p> <p style="text-align: center; background-color: #ccc; padding: 5px;">SIGN IN</p> <p style="text-align: center; font-size: small;">Don't have an account? Click here to create one.</p> <p><input type="checkbox"/> I agree to EULA terms and conditions View EULA</p> </div> <p>Note: You must review and agree to the terms and conditions of the End-User License Agreement (EULA) before accessing the system.</p>

Step	Action
4	<p>Click Sign In.</p> <div data-bbox="711 304 1000 642" style="text-align: center;"> </div> <p>Note: Once you are logged in, you will be logged out after an hour of inactivity.</p>
5	<p>On the NextGen multiproduct entry page, select the Multifamily icon to access the system.</p> <div data-bbox="565 766 1143 951" style="text-align: center;"> </div>

1.3. 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 you personalize your work area.

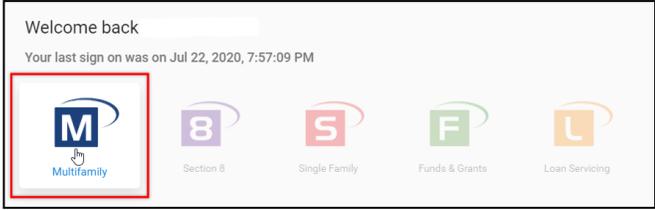
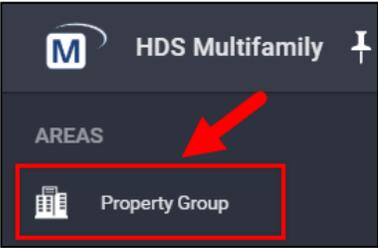
Toolbar Icons	Action
	<p>Located on the left side of the toolbar, the Pin  allows you to manage the size of your workspace. Hide the Areas menu by clicking the Pin. The names of the work areas will no longer be visible, but their icons will still be displayed. Click the Pin again to view the full menu.</p>
	<p>Use Favorites  to create shortcuts for work areas. Click Favorites and select the desired area from the drop-down. Remove a shortcut by clicking on the selected items in the Favorites menu.</p>
	<p>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.</p>
	<p>To access the Units and Tenants from the toolbar, click .</p>

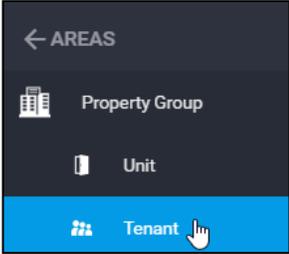
Toolbar Icons	Action
	<p>Your profile page is in the user account menu on the toolbar. The profile details show the information used to create your NextGen account. In this area, you can view and modify your personal information and details of your company. Usernames are not editable and will remain grayed out. To view your information, click your name in the top-right corner the menu bar select Profile from the drop-down.</p>
	<p>Alerts are generated when certain actions take place in Financial Monitoring and Property Group work areas. Notifications are connected to the email functionality for Property Group work areas and Financial Monitoring reminders.</p>

Notes

- Alerts are generated when certain actions take place in Property Group work areas.
- Notifications are connected to the email functionality for Property Group work areas reminders.
You will only receive a Notification for email messages that have been sent to your NextGen account, as emails are linked to individual user profiles. You can respond to email messages directly in the Notification.
- To clear Alerts/Notifications individually, click Dismiss from within the alert. To clear all Alerts/Notifications, click Dismiss All located at the top of the list.

1.4. Generating Occupancy Data

Step	Action
1	<p>Access the HDS NextGen login page at hdsweb.vhda.com. Note: Google Chrome is the required browser to access the system.</p>
2	<p>On the NextGen multiproduct entry page, select Multifamily icon to access the system.</p> 
3	<p>Navigate to the Areas menu and click the Property Group.</p> 

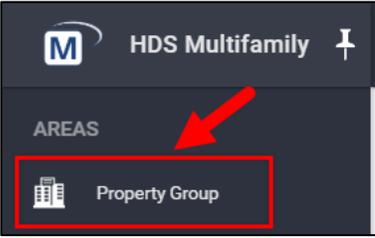
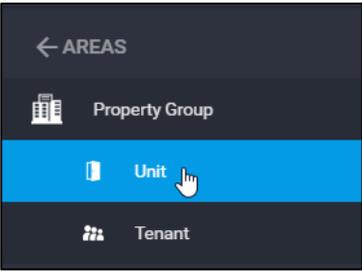
Step	Action
4	<p>Select Tenant to access the Tenant work area.</p>  <p>A dark-themed menu titled 'AREAS' with a back arrow. It contains three options: 'Property Group' with a building icon, 'Unit' with a document icon, and 'Tenant' with a group of three people icon. The 'Tenant' option is highlighted in blue, and a hand cursor is pointing at it.</p>
5	<p>Click the Reports tab.</p>  <p>A light green header with 'Tenant' and a group icon. Below it is a search bar and a 'Reports' button. A red arrow points to the 'Reports' button, which is also outlined in red.</p>
6	<p>Click Occupancy and Demographics Report.</p>  <p>A white box titled 'HDS Reports' containing two buttons: 'TIC Report' and 'Occupancy and Demographics Report'. A red arrow points to the 'Occupancy and Demographics Report' button, which is outlined in red.</p>
7	<p>Select a site in the Site Selection field.</p>  <p>A form titled 'Occupancy and Demographics Report'. It features a 'Site Selection' dropdown menu outlined in red. To the right are radio buttons for 'All' (selected) and 'Current Tenants', a checkbox for 'Include Archived', a 'Run' button, and a 'Close' button.</p>

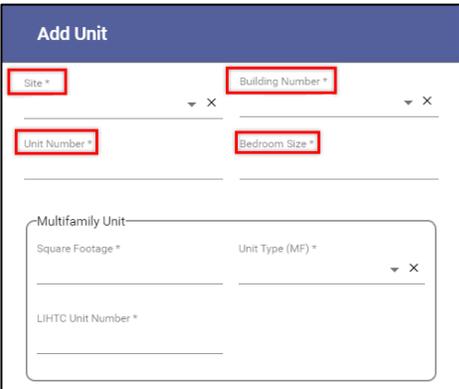
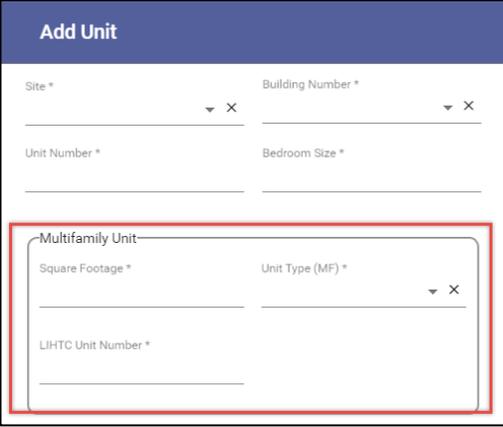
Step	Action																																																															
8	<p>Click Run.</p> <div data-bbox="690 304 1019 401" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <input type="checkbox"/> Include Archived Run </div> <p>When it has processed, the report will display.</p> <div data-bbox="365 466 1343 1066" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: 90%;"> <p>Occupancy and Demographics Report</p> <p>Site Selection Help Desk Sample Property <input checked="" type="radio"/> All <input type="radio"/> Current Tenants <input type="checkbox"/> Include Archived Run </p> <p>Drag a column header here to group by that column <input type="text" value="Search..."/> </p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Site Name</th> <th style="width: 10%;">Project Number</th> <th style="width: 10%;">Building</th> <th style="width: 10%;">Unit Number</th> <th style="width: 20%;">Head of HH Last Name</th> <th style="width: 10%;">Enter Date</th> <th style="width: 10%;">Move In Date</th> </tr> </thead> <tbody> <tr> <td>Help Desk Sample Property</td> <td>1</td> <td>VA02</td> <td>201a</td> <td></td> <td>12/14/2008</td> <td>8/12/2008</td> </tr> <tr> <td>Help Desk Sample Property</td> <td>1</td> <td>VA02</td> <td>201a</td> <td></td> <td>8/19/2008</td> <td>8/12/2008</td> </tr> <tr> <td>Help Desk Sample Property</td> <td>1</td> <td>VA02</td> <td>201a</td> <td></td> <td>5/10/2008</td> <td>2/28/2008</td> </tr> <tr> <td>Help Desk Sample Property</td> <td>1</td> <td>VA01</td> <td>201b</td> <td></td> <td>10/13/2010</td> <td>10/13/2010</td> </tr> <tr> <td>Help Desk Sample Property</td> <td>1</td> <td>VA11</td> <td>28</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Help Desk Sample Property</td> <td>1</td> <td>VA13</td> <td>161</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Help Desk Sample Property</td> <td>1</td> <td>VA01</td> <td>203</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Help Desk Sample Property</td> <td>1</td> <td>VA03</td> <td>15</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Create Filter</p> </div>	Site Name	Project Number	Building	Unit Number	Head of HH Last Name	Enter Date	Move In Date	Help Desk Sample Property	1	VA02	201a		12/14/2008	8/12/2008	Help Desk Sample Property	1	VA02	201a		8/19/2008	8/12/2008	Help Desk Sample Property	1	VA02	201a		5/10/2008	2/28/2008	Help Desk Sample Property	1	VA01	201b		10/13/2010	10/13/2010	Help Desk Sample Property	1	VA11	28				Help Desk Sample Property	1	VA13	161				Help Desk Sample Property	1	VA01	203				Help Desk Sample Property	1	VA03	15			
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Help Desk Sample Property	1	VA02	201a		5/10/2008	2/28/2008																																																										
Help Desk Sample Property	1	VA01	201b		10/13/2010	10/13/2010																																																										
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Help Desk Sample Property	1	VA01	203																																																													
Help Desk Sample Property	1	VA03	15																																																													
9	<p>To export the report, click the Export icon. The report will download as an Excel file.</p> <div data-bbox="699 1157 1011 1262" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <input type="text" value="Search..."/> </div>																																																															

2. Adding a Unit to a Property Group

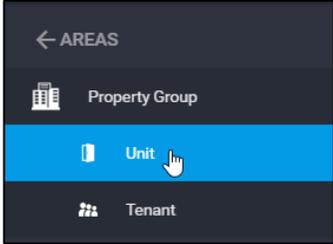
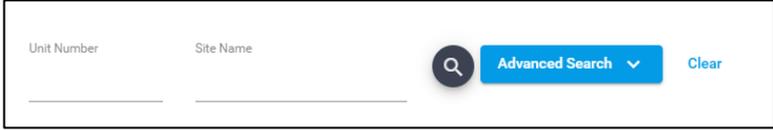
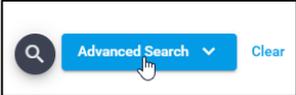
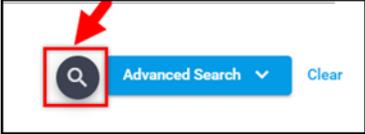
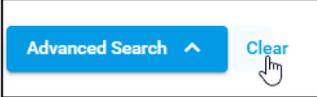
Users will follow this procedure to add units to a property group. This section includes the process of locating unit records that have been previously added.

2.1. Adding a Unit

Step	Action
1	Access the HDS NextGen login page at hdsweb.vhda.com . Note: Google Chrome is the required browser to access the system.
2	On the NextGen multiproduct entry page, select Multifamily icon to access the system. <div data-bbox="542 674 1170 892" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Welcome back _____ Your last sign on was on Jul 22, 2020, 7:57:09 PM  </div>
3	Navigate to the Areas menu and click the Property Group . <div data-bbox="667 982 1042 1220" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div>
4	Select Unit . <div data-bbox="675 1304 1037 1575" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div>
5	Click the Add Unit icon. <div data-bbox="483 1661 1227 1818" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div>

Step	Action
6	<p>Select the Site Name and Building Number, then enter the Unit Number and Bedroom Size.</p> 
7	<p>Enter the Square Footage and LIHTC Unit Number. Select the Unit Type (MF).</p> 
8	<p>Click Save.</p> 

2.2. Locating a Unit Record

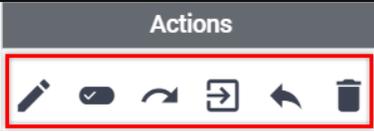
Step	Action
1	<p>Navigate to the Areas menu and click Unit to access the unit work area.</p> 
2	<p>Enter the Unit Number and the Site Name in the blank fields.</p> 
3	<p>Click Advanced Search for additional search options.</p>  <p>Fill in the additional search criteria.</p> 
4	<p>Click the Search icon to view the search results and locate the unit record.</p> 
5	<p>To locate a different unit record, click Clear to delete prior search results. Begin a new search by following prior instructions.</p> 

3. Creating a Tenant Income Certification

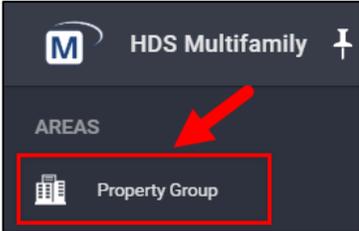
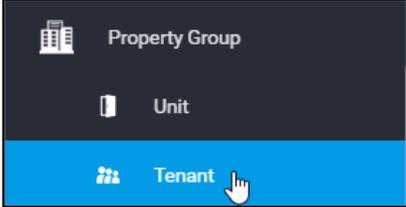
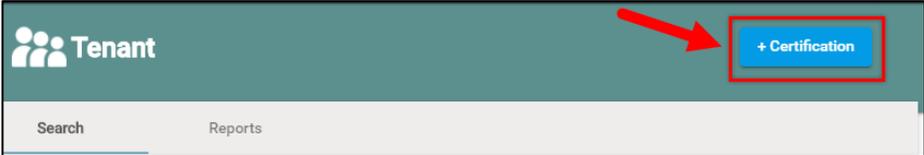
Users will follow these procedures to add a move-in record, create a move-out certification, a unit transfer, and recertify a household. This section includes the process to generate a Tenant Income Certification (TIC).

3.1. Action Icons for Tenant Records

These action icons are options users can use to edit a tenant's information, make corrections to a tenant's certification, or recertify a tenant's household. Additional icons include options to create a move out or unit transfer certification or delete a certification completely.

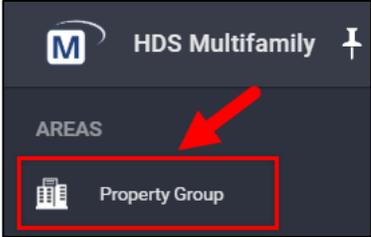
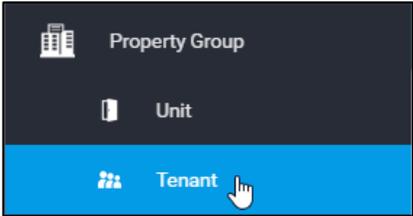
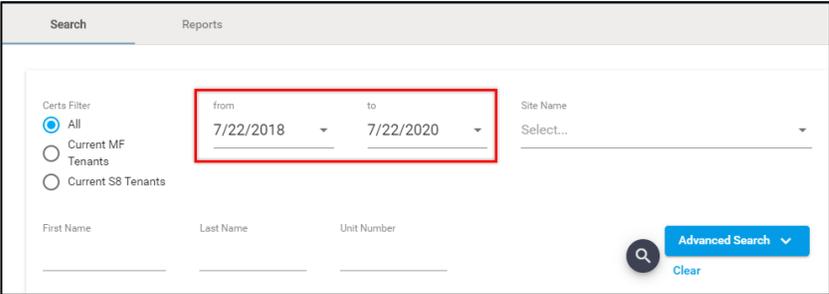
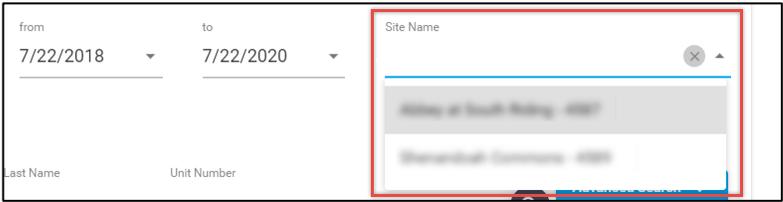
Action Icons			
Actions	First Name	Last Name	Program
			
	Use the Edit icon to view and edit information about an individual tenant.		
	Use the Correct icon to quickly make corrections to a tenant's certification.		
	Use the Recertify icon to recertify a tenant.		
	Use the Move Out icon to create a Move Out certification.		
	Use the Unit Transfer icon to create a Unit Transfer certification.		
	Use the Delete icon to delete a certification.		

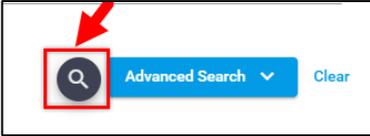
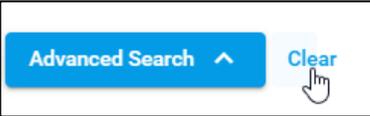
3.2. Creating a Tenant Income Certification (TIC)

Step	Action
1	Access the HDS NextGen login page at hdsweb.vhda.com . Note: Google Chrome is the required browser to access the system.
2	On the NextGen multiproduct entry page, select Multifamily icon to access the system. <div data-bbox="516 464 1192 680" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> Welcome back Your last sign on was on Jul 22, 2020, 7:57:09 PM  </div>
3	Navigate to Areas column and click Property Group . <div data-bbox="675 770 1034 1001" style="border: 1px solid black; padding: 10px; margin: 10px 0;">  </div>
4	Click Tenant to access the Tenant work area <div data-bbox="651 1092 1057 1299" style="border: 1px solid black; padding: 10px; margin: 10px 0;">  </div>
5	Click +Certification in the top-right corner of the screen. <div data-bbox="393 1390 1317 1545" style="border: 1px solid black; padding: 10px; margin: 10px 0;">  </div>

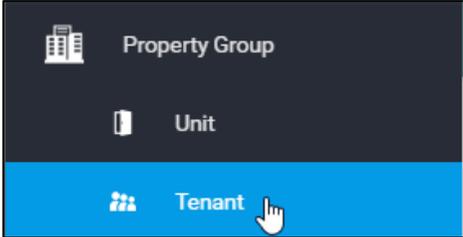
Step	Action
6	<p>Select the Site, Building Number, and Unit Number.</p> <div data-bbox="553 304 1151 709" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p style="text-align: center; background-color: #4a7c7c; color: white; padding: 5px;">Add Certification</p> <p>Site ▼</p> <hr/> <p>Building Number ▼</p> <hr/> <p>Unit Number ▼</p> <hr/> <div style="text-align: right; margin-top: 10px;"> Save Cancel </div> </div> <p>Note: The Actions field will appear with available options based on the unit status. If you are creating a Tenant Income Certification for the unit, or if the unit is vacant, Occupy Unit will appear.</p> <p>If the unit is occupied, then you will have other options to choose from, like Unit Transfer, Move-Out, or Recertify.</p> <div data-bbox="587 938 1117 1409" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p style="text-align: center; background-color: #4a7c7c; color: white; padding: 5px;">Add Certification</p> <p>Site ▼</p> <hr/> <p>Building Number ▼</p> <hr/> <p>Unit Number ▼</p> <hr/> <div style="border: 2px solid red; border-radius: 10px; padding: 5px; margin-top: 10px;"> <p>Unit Transfer</p> <p>Move-Out</p> <p>Recertify</p> </div> </div>
7	<p>Click Save to add the certification.</p> <div data-bbox="699 1497 1008 1633" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <div style="text-align: right; margin-top: 10px;"> Save Cancel </div> </div>

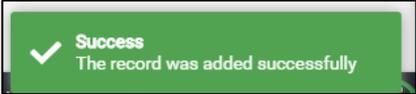
3.3. Locating a Tenant

Step	Action
1	Navigate to the Areas menu and click Property Group . 
2	Click Tenant . 
3	Select a date range. 
4	Select a Site Name . 
5	Enter the tenant's First Name , Last Name , and Unit Number . 

Step	Action
6	<p>Click Advanced Search for additional search options.</p>  <p>Fill in the additional search criteria.</p> 
7	<p>Click the Search icon.</p> 
8	<p>To begin a new search, click Clear and reenter the search criteria.</p> 

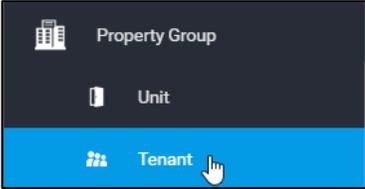
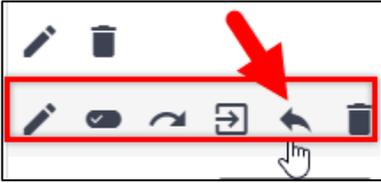
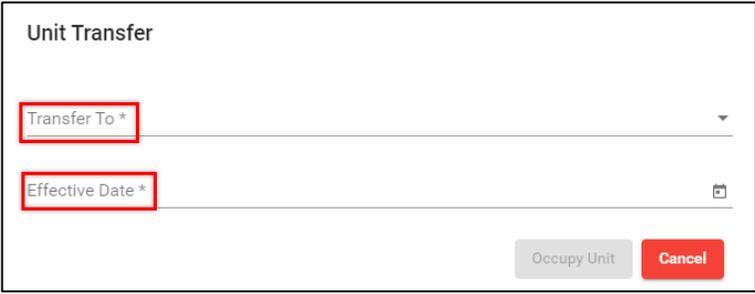
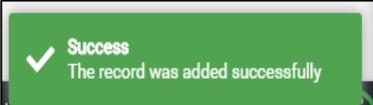
3.4. Recertifying a Tenant

Step	Action
1	<p>Navigate to Areas column and click Property Group.</p> 
2	<p>Click Tenant.</p> 

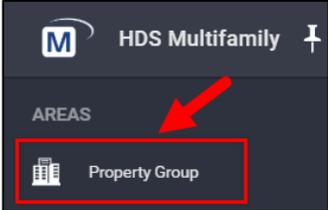
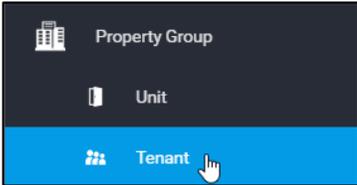
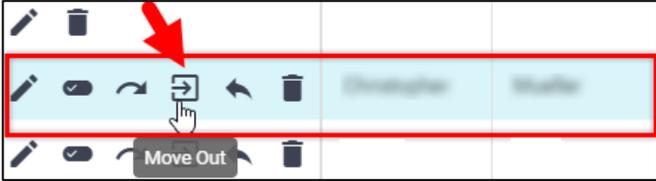
Step	Action
3	Conduct a tenant search by following the Locating a Tenant process on pages 15 and 16.
4	Once you have located the tenant, click the Recertify icon. 
5	Select Recertification for Certification Type and select Effective Date. 
6	Click Create Recertification. 
7	A Success notification will display to indicate that the record was successfully added. 

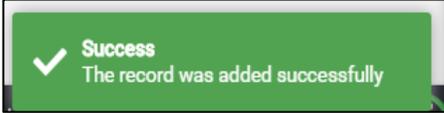
3.5. Creating a Unit Transfer Certification

Step	Action
1	Navigate to Areas column and click Property Group . 

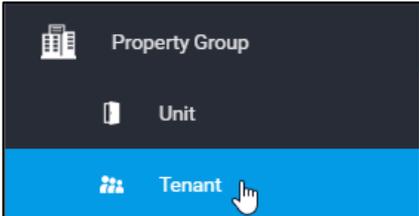
Step	Action
2	<p>Click Tenant.</p> 
3	<p>Conduct a tenant search by following the Locating a Tenant process on pages 15 and 16.</p>
4	<p>Once you have located the tenant, click the Unit Transfer icon.</p> 
5	<p>Select the Transfer To and Effective Date.</p> 
6	<p>Click Occupy Unit.</p> 
7	<p>A Success notification will display as a popup to indicate that the record was successfully added.</p> 

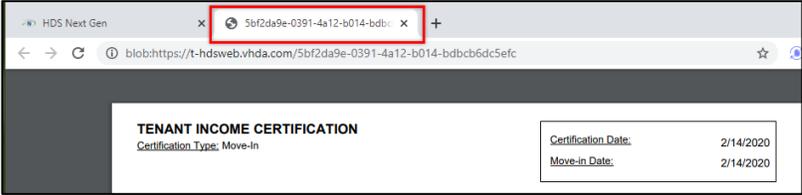
3.6. Creating a Move Out Certification

Step	Action
1	Navigate to Areas column and click Property Group . 
2	Click Tenant . 
3	Conduct a tenant search by following the Locating a Tenant process on pages 15 and 16.
4	Once you have located the tenant, click the Move Out icon. 
5	Select an Effective Date . 
6	Click Create Move Out . 

Step	Action
7	<p>A Success notification will display as a popup to indicate that the record was successfully added.</p> 

3.7. Printing a Tenant Income Certificate

Step	Action
1	<p>Navigate to Areas column and click Property Group.</p> 
2	<p>Click Tenant.</p> 
3	<p>Conduct a tenant search by following the Locating a Tenant process on pages 15 and 16.</p>
4	<p>Select a tenant.</p> 
5	<p>Click TIC Report.</p> 

Step	Action
6	<p>The TIC Report will open an additional tab in your browser.</p> 
7	<p>Select the Print icon to print the report.</p> 