

April 2021 HDS NextGen Virtual Training Sessions Submitted Questions & Responses

HDS NextGen virtual training recording, guidance videos and a written user guide are posted to the [Property Owners and Managers page](#) on the Virginia Housing website. Visit our website to sign-up for [Compliance and Asset Management Updates](#) and select the "Property Manager" email list.

Log-in and Access

Q: What is the email address again to send the error messages?

A: For HDS NextGen error messages, email HDSAdmin@VirginiaHousing.com. Include a description in the email subject line, along with your site name.

Q: For clarification, whenever I have questions about HDS should I forward my questions to HDS Admin or do I continue to contact my Compliance Officer or do both?

A: You should initiate the process with your assigned Compliance Officer to keep them informed of what is going on at your site, in the event other sites are having a similar issue. Your Compliance Officer will provide support or forward your inquiry to HDSAdmin@VirginiaHousing.com for further assistance.

Q: On the email option in HDS NextGen, was that only to email someone within the Virginia Housing organization?

A: The email function within HDS NextGen is used to email the contact(s) assigned to the site.

Q: My email address is incorrect; how can I change it?

A: To update your profile, please send an email to HDSAdmin@VirginiaHousing.com and ask to have your email address corrected. We have the ability to correct it on our end. Currently, users cannot update their profile information in HDS NextGen. We are working with the vendor to provide a fix that will allow this function.

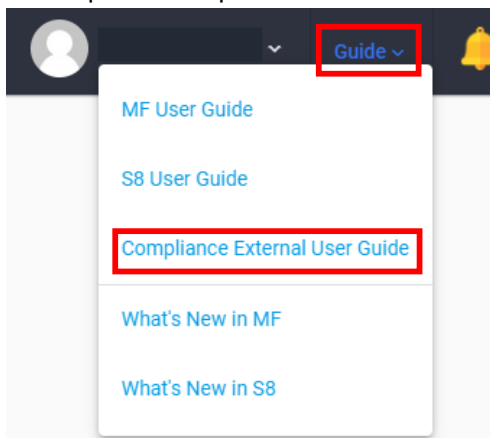
Q1: Where do you go to get the user guide?

Q2: Are we able to print the user guide or manual?

A: There is an online user guide that can be accessed while working in the HDS NextGen system. On the top right of the screen, click:

1. Guide
2. Compliance External User Guide

The user guide will download as a PDF at the bottom left of your screen. Once you open the PDF, you will follow your normal process to print it.



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Log-in and Access...continued

Q: I work at two sites, but when I log-in, only one site is there.

A: Send an email to HDSAdmin@VirginiaHousing.com, requesting that the missing site be added to your HDS NextGen registration. Include a description in the email subject line, along with your site name.

Q: What do I do to log out?

A: Users must log out of the HDS NextGen application instead of clicking the “x” to close the Google Chrome web browser. When the user logs out of the application correctly, it resets the application.

To correctly log out of the system,

1. Click on your name in the upper right corner of the screen
2. Choose log out
3. Close your browser

Following these steps will reset the application so that it will function properly on your next log in.

Q1: I've selected Unit and Tenant under the star, however, those items are not populating under the Property Group.

Q2: Why do I not have anything under "Areas" on the left side menu?

Q3: My AREAS is blank - no Unit or Tenant are listed, what do I do?

A: This error is caused by not properly logging out of your previous session in the HDS NextGen application. Users must log out of the application instead of clicking the “x” to close the Google Chrome web browser.

If you receive the error message “Not an Authorized User” after working in the system,

1. Click on your name in the upper right corner of the screen
2. Choose log out
3. Close your browser, then
4. Log into HDS NextGen

Following these steps will restore the application menu options and the system will be fully functional.

If the issue persists in HDS NextGen, send an email to HDSAdmin@VirginiaHousing.com. Include a description in the email subject line, along with your site name.

Tenant Certification Actions

Unit Transfer Certification (UT)

The Unit Transfer Certification is only applicable for units within the same “project” as defined on line 8b in Part II of the IRS 8609 form. The UT is used to move a family from one unit to another within the same site. You will only see this function when working with an occupied unit.

Q: On a Rehab site, if a resident transfers to another unit in a different BIN is this a UT or MI or IC?

A: Unit Transfer Certifications (UT) are only applicable for existing households in the current site and after the Initial Certification (IC) or Move-In Certification (MI) is completed and submitted.

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Tenant Certification Actions...continued

- Q: When you transfer a resident to another unit is their recertification date the original date or the date you transfer them?**
A: A tenant's recertification date is always on the anniversary of their move-in. If you need further assistance, contact your assigned Compliance Officer.
- Q: Can I transfer between properties?**
A: No. A household's eligibility cannot transfer from one site to another. A unit transfer can only be completed within the same site. Each site is a separate record in HDS NextGen.

Move-In Certification (MI) vs Initial Certification (IC)

- Q1: Is an initial certification needed during rehab if the tenant is remaining in the same unit; and new tax credit period has started?**
- Q2: When doing a move-in do we click on move-in or initial recertification?**
- Q3: When do you use move-in cert. as opposed to initial? What is the difference between the two?**
A: Move-In Certifications (MI) are completed if a new household is moving in that has never lived at the site.

Initial Certifications (IC) are completed if you are re-qualifying a household with existing tenancy at your site. The IC is used to re-qualify or confirm income eligibility at Tax Credit or Rehab sites.
- Q: Under the Cert Actions, for a cert that has been submitted, I noticed when we select "Create Certification" it only shows the Certification Type of MI or IC not UT or MO? Could this be a system issue?**
A: Confirm that the MI or IC is submitted with complete dates in the system to access the Unit Transfer or Move-Out Cert Action.

If this has been completed and the issue persists, contact HDSAdmin@VirginiaHousing.com. Include a description in the email subject line, along with your site name.
- Q: I didn't see MI as an option but I guess it's because it has already been created.**
A: You will only see MI or IC as an option if the unit is vacant.
- Q: If we requalify existing tenants for transfer to another unit, (income verification) can we use the Move-Out Cert and then "Initial" for the new unit?**
A: Yes. The Move-Out Certification (MO) then Initial Certification (IC) may be used for existing households moving from one unit to another unit in the site.

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Tenant Certification Actions...continued

Q1: When trying to create a cert, MI is not listed, is that because the previous tenant had not been moved out?

Q2: When trying to add a certification for a move-in on a unit, it does not provide me any actions to pick from. How do I fix this issue?

A: The Move-In Certification (MI) option is not present either because the previous tenant has not been moved out of the system or the Move-Out Certification (MO) has not been submitted. A tenant certification is not active until it is submitted.

Ensure that an MO has been submitted and processed for the previous household. If this has been completed and the issue persists, contact HDSAdmin@VirginiaHousing.com. Include a description in the email subject line, along with your site name.

Q: If we are missing employment information or a signed TIC from residents (due to predecessors) and have actively requested the information but do not receive it, will we be held liable?

A: Yes. The designated, certified management agent must ensure the tenant files are complete.

Q: How often are submitted TICs reviewed by Virginia Housing?

A: Tenant data is submitted annually to HUD. Regular updates in HDS NextGen are required to ensure complete tenant activity.

Q: Is it necessary to print MO action cert for filing?

A: No. All tenant activities must be updated in HDS NextGen regularly. Frequent updates in HDS NextGen provides the necessary information to complete the compliance monitoring review and annual tenant data upload to HUD as required.

Q1: When I try to use the tree, it tells me "User does not have access".

Q2: I am getting error messages telling me that I do not have access to my property.

A: If you click on the site name or building name when using the Blue Tree to navigate in the system, you will receive a system error message stating "not authorized to access this module." External users do not have access to the Site or Building information in HDS NextGen.

Guidance: As an alternative, click on the carat (>) to the left of the Site, Building or Unit, to expand and display the information stored underneath each option. When you see the tenant certifications, double click the one closest to the unit number and the system will take you to the certification screen.

Tenant Income Certifications

Q1: Why is the move-in date calendar not available to change if the date is not correct?

Q2: If I need to go back in to change the date because their move-in date is different, the calendar to pick a date from is greyed out.

A: First, make sure that the move-out date for the previous household is correct. The calendar will not allow a move-in date prior to the move-out date. If the move-out date is correct, the calendar should be accessible for a move-in.

If the date is correct and the calendar function is not available, email HDSAdmin@VirginiaHousing.com for assistance. Include a description in the email subject line, along with your site name.

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Tenant Income Certifications...continued

Q: If the system does not allow you to create the Move-Out cert action what should you do?

A: The user should ensure that the most current certification has been submitted and is an active certification. Otherwise, contact us at HDSAdmin@VirginiaHousing.com for assistance. Include a description in the email subject line, along with your site name.

Q: I have residents that disappear or when I try to do a certification, no options are available. How do we fix that?

A: If you created a tenant certification and saved it in the system and now it cannot be found, make sure that your search date range covers the effective date of the missing tenant certification.

Secondly, you should consider using the Blue Tree. It is used to drill down to a specific Site, Building, Unit and Tenant. Remember, do not click on the Site or Building, or you will get an error stating that you are not an authorized user. Only click on the carat.

If you do not see any options available for Cert Actions, make sure that the previous tenant certification was submitted.

Q1: Sometimes, when everything is put in correctly, it will save, but won't let me print the TIC.

Q2: Are we unable to generate TIC reports by first going to the tenant certification page and then clicking the report button? It no longer works for me, just loads indefinitely.

A: Previously, users of non-tax credit properties were experiencing an issue with the income limits not populating on the TIC. This application issue was resolved April 22, 2021, with an installed system upgrade from the vendor. If you are experiencing this issue, contact us at HDSAdmin@VirginiaHousing.com. Include a description in the email subject line, along with your site name.

Q: Has the save option been corrected on the TIC to allow us to save them and do the next task, i.e. a correction then a recert?

A: All tenant certifications can be saved in HDS NextGen. The Move-In Certification (MI) and Initial Certification (IC) issue, where users were unable to save those two certification types, was resolved April 14, 2021. If you are experiencing this issue, contact us at HDSAdmin@VirginiaHousing.com. Include a description in the email subject line, along with your site name.

Q1: Once you save the cert, do you have a place to submit like you had to in WTCMS?

Q2: We used to click the Cert Actions button and Submitted will show on the drop-down list. Is this no longer an option?

A: Once the user saves the tenant certification, it has to be submitted in order for it to be an active certification.

This is done by clicking the blue Cert Action button at the top right of the Tenant Certification screen and completing the following steps:

1. Click in the circle next to Modify Current Certification
2. Click Submit
3. Confirm Status Change
4. Click Yes
5. Click Save

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Tenant Income Certifications...continued

- Q:** After income and assets are entered, I am not seeing the Save button highlighted.
A: If there are no errors showing on the screen, contact us at HDSAdmin@VirginiaHousing.com for assistance. Include a description in the email subject line, along with your site name.
- Q:** I have a unit that is listed as Not Occupied, even though I have submitted a MI cert.
A: This issue has been resolved. There was an issue in HDS NextGen with occupied units showing as vacant, but a fix was installed on February 18, 2021. If you are experiencing an issue, contact us at HDSAdmin@VirginiaHousing.com for assistance. Include a description in the email subject line, along with your site name.
- Q1:** For a 3rd year certification (based on our program requirements) that would not be an Annual Recert. How often do we recertify?
Q2: Is there an option to recertify?
A: Select the Annual Recertification (AR) option for all recertifications, including the 3-year recertifications completed for Conventional sites. This is not a change from our previous system WTCMS.
- Q:** What if you don't have a SS# for a newborn?
A: Use 0000 for new born or unborn occupants.
- Q:** Are the following added automatically: utility allowance, income limits?
A: Yes, income limits are populated in the system. Utility Allowances (UA) are not. You must add UAs when creating your certification. Income limits are pulled from our reference table based on the locality of the site.
- Q:** How easy is it to cancel a transfer once submitted? The resident was transferred to the wrong system.
A: The transfer can be deleted or corrected. There is a sequence of steps that must be followed in order to properly complete this task.
For example: The Jones household is transferred out from unit #402 into unit #601. Given the example, complete the following steps:
To delete the transfer,
- Unsubmit and delete the *transfer Move-In* Certification (unit #601), then
 - Delete the *transfer out* certification (unit #402)
- If a correction is needed,
- Unsubmit and delete the *transfer Move-In* Certification (unit #601)
 - Unsubmit the *transfer out* certification (unit #402)
 - Click on the Cert Actions button at the upper right of the page
 - Select the option to modify the certification
- If you continue to have issues with the actions for the certification, contact your assigned Compliance Officer for further assistance.

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Tenant Income Certifications...continued

Q: What does NTC TIC mean?

A: NTC TIC stands for Non-Tax Credit Tenant Income Certification. This was added on April 22, 2021, to print the TIC for non-tax credit sites.

Q: If the household has already been approved for recertification or a move-in, can another member be added to the household prior to the next certification?

A: Yes, another household member can be added.

Q: Annual income or monthly income?

A: Be sure to use annual income.

Q: For a recert, it seems to ask me about the move-in cert income in one of the boxes. Shouldn't this automatically fill in from the existing cert in the system?

A: Yes, it should. Contact us at HDSAdmin@VirginiaHousing.com for assistance. Include a description in the email subject line, along with your site name.

Q: Will tax credit interims upload when done in one site?

A: Interim Certifications apply to the Section 8 program, not the Tax Credit program. All tenant activity completed in your site's compliance system XML file will update to the tenant record in HDS NextGen.

Unsubmitting vs. Correcting Tenant Certifications

Using the Unsubmit action allows you to correct and re-submit an existing certification. Using the Correct action allows you to create a new corrected version of a certification (shows with an "**"). The previous certification will remain available for record retention.

Q1: How do you correct a previous certification or a move-in certification?

Q2: Having trouble correcting a previous cert. The cert loads and then the most current cert pops up as a correction instead of the previous cert.

Q3: Can you process a correction to an Annual Recertification?

A: The unsubmit feature is available to you to make corrections and re-submit.

We are aware that the correction process is not working in HDS NextGen as it should. Once we have received the vendor's fix, we will notify the users that the problem has been resolved via Constant Contact.

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Section 8 Rental Assistance and Income Adjustments

Q1: I have a resident that is giving up her rental assistance and now will be using her section 8 voucher. It is scheduled to take place on May 1st. What do I need to do for her?

Q2: We use outside subsidy and vouchers. How do you enter the subsidies?

Q3: For Housing voucher portion where is the correct place to reflect it?

A: On the Tenant Certification screen,

1. Click on the Cert Information tab on an unsubmitted certification
2. Go to the Assistance Section of the tenant certification
3. Click on the drop-down option to select the Source of Federal Rent Assistance
4. Type in the Federal Rent Assistance Amount
5. Select the Source of Other Non-Federal Rent Assistance from the drop-down list
6. Type in the Other Non-Federal Rent Assistance Amount
7. Type the Total Monthly Rent Assistance amount.

Q: Are you required to enter the \$480 deduction for dependents and \$400 for elderly?

A: Income adjustments and deductions are applicable for sites required to use the HDS NextGen Section 8 module. Income deductions are not applicable for Tax Credit or Tax-Exempt Bond program eligibility.

Building

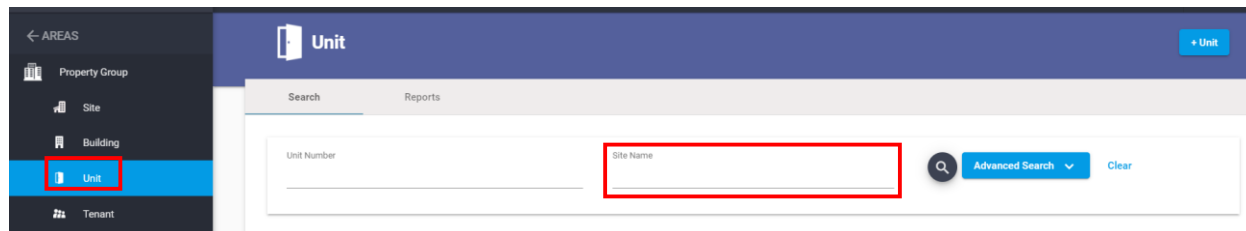
BINs are associated with Tax Credit properties and are set based on the IRS 8609 form.

Q1: Is there a list of each unit Bin #?

Q2: How can I find my Bins?

Q3: Which tab do I go under when I want to see a list of all the buildings?

A: The user can go to the Unit Search screen and perform a search by Site Name. It will return a list of all Buildings and Units for that site. The user can click the column header to sort by Building. The data can also be exported into Excel.



Unit

Q: Does every unit at a property have to be loaded in the system if the property is blended tax credit along with market rate units. In other words, do the market rate units at the property have to be accounted for in the system?

A: Occupancy for all units, including Market Rate units, must be updated in HDS NextGen. Although income verification is not required, Market Rate units play an important role in maintaining compliance with the Next Available Unit rule for sites with Tax Credits or Tax-Exempt Bonds, as well as converting the unit to low-income to correct noncompliance.

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Unit...continued

- Q: I may be jumping ahead, but if setting up a property that has no data transferred over from your old system, do I just enter the current tenant info for each unit? Do I have to enter previous tenant info?**
A: Contact your assigned Compliance Officer for assistance.
- Q: I have a unit that is approved as a resident services unit. It shows as vacant. Should it be set as inactive?**
A: Contact your assigned Compliance Officer for assistance.
- Q: Do we have to ADD UNIT if they are already listed in the system?**
A: No, if the unit already exists in the system, it does not need to be added again. It is ready to be occupied. If you don't see your unit in the system, email your assigned Compliance Officer.
- Q: I can access units by using the Units tab, but not by using the tree. Do I still need to reach out to HDS?**
A: Yes, contact HDSAdmin@VirginiaHousing.com for assistance. Include a description in the email subject line, along with your site name. If you can access the units from the Unit Screen, you should be able to access the Units from the Blue Tree as well.
- Q: I am having a problem when entering a new resident, it will not allow me to input the income and assets.**
A: Contact us at HDSAdmin@VirginiaHousing.com for assistance. Include a description in the email subject line, along with your site name.
- Q: When I select a Unit, the information is blank for the Tenant. There should be information. It is the same when I click on several others. Is this because my dashboard is blank and I was unable to access my property?**
A: If the unit is occupied, you should be able to see the tenant data. Contact us at HDSAdmin@VirginiaHousing.com for assistance. Include a description in the email subject line, along with your site name.
- Q: I do not see the Vacant Units on the Dashboard. It is clear. I also am unable to select the property as the option is not there.**
A: The HDS NextGen Dashboard is connected to compliance testing for each of the sites. Due to the IRS relief on compliance monitoring and working with our vendor on system updates, HDS NextGen compliance testing has not been conducted for all sites within our portfolio. This does not reflect or impact your access to the system. Reach out to your assigned Compliance Officer if you have questions.
- Q: Under one of my properties, the unit number appears to be generated and does not match with the actual building units. Am I able to change the generated numbers to the actual unit number? It makes it a little difficult when looking for a specific unit number.**
A: Yes, it can be changed. Contact us at HDSAdmin@virginiahousing.com and we can assist you with that. Include a description in the email subject line, along with your site name.
- Q: What do you do if someone was moved in but put in the wrong unit number? Would you do a unit transfer or a move-out, move-in?**
A: Delete the certification and move the tenant in to the correct unit. Do not transfer to the correct unit because it is not truly a transfer.

A Unit Transfer should only occur when there is established eligibility in a unit and the eligibility is being transferred to another unit in the site.

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Uploading Tenant Data Using Your Site Compliance System

Q: What is XML file?

A: An XML file is an Extensible Markup Language File and is used to structure data for storage and transport. It is a file that contains tenant data in a specific format for uploading into our system. It prevents users from having to input data into two compliance systems (the site's compliance system and HDS NextGen).

Uploading files: The XML tool will extract the data from the site's compliance system and create an XML file based on NAHMA standards 5.0 or higher. The user will then log in to HDS NextGen and upload the XML file for their site in our system. If the file is without error, it will update the household information. If there are errors, it will generate an Exception Report. The user will then need to research/resolve the issue(s), create a new XML file and upload the new file.

Q: Can we upload from Yardi, Emphasys, MRI and Tenmast?

A: HDS NextGen can receive electronic uploads from several different compliance systems. The application requires XML files that follow the NAHMA standards 5.0 or higher. Contact your site's compliance system vendor if you have questions.

Q: What is in Yardi to make us aware that we can Upload XML files? Is this something our compliance officer is aware of?

A: Access to upload XML files from your site's compliance system is a management decision. Reach out to your software vendor for that feature.

Q: If attempting to set up the export function from our software using NAHMA 5.0 is the URL Code the same in HDS as it was in WTCMS? I have copied the previous one below for reference:

<https://webcompliance.vhda.com/WebCompliance/Login/Login?ReturnUrl=%2fwebcompliance>

A: To import the information into HDS NextGen, the URL is <https://hdsweb.vhda.com>.

Q: Are certs that are uploaded from an XML file automatically submitted?

A: Once you submit the certification information via an XML upload, it is automatically submitted for that upload only. Anything done to the certification in the future will need to be uploaded through a new XML upload.

Q: What happens when some files upload and some get errors on XML files?

A: If you receive errors during the XML file upload, the system will generate an Exception Report. Review your tenant activity report within your site's compliance system and resolve the issue(s), create a new XML file and upload the new file.

If you need further assistance, contact us at HDSAdmin@VirginiaHousing.com. Include a description in the email subject line, along with your site name.

Q: How do we re-upload?

A: Recreate the file within your site's compliance system and open the HDS NextGen system to re-upload. You cannot re-upload a file that has errors.

Q: What is an example of a file that would need to be uploaded?

A: Users have the ability to upload photos of their site or any document that they feel is important enough to attach to their site at the Unit or Tenant level. Virginia Housing is not currently requiring files to be uploaded. However, HDS NextGen does accept various file types (Word, Excel, PNG, PDF, JPEG, etc.).

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Uploading Tenant Data Using Your Site Compliance System...continued

- Q: You stated you can manipulate the info in Excel but it did not import it in the system.**
A: You can export information into Excel. The import feature applies to the XML upload. The XML file should not be manipulated.
- Q: So when we input the compliance information in our system (Yardi) and it creates a TIC for us, do we have to input it again in HDS or do we scan it into the system?**
A: You will have to manually update the tenant activity in HDS NextGen or use an XML file to upload the tenant activity.
- Q: I'm not seeing the XML Tenant Upload option on my screen.**
A: Contact us and we will turn on the XML feature for you. It is not an automatic feature within the system. Send an email to HDSAdmin@VirginiaHousing.com. Include a description in the email subject line, along with your site name.
- Q: I uploaded XML files and some went in ok. When I opened the software the next day, I had several Annual Recertifications for the same date.**
A: Contact us when you have a couple of files to review and we will take a look at the file behind the scenes to research the error. Email us at HDSAdmin@VirginiaHousing.com. Include a description in the email subject line, along with your site name.

Reporting

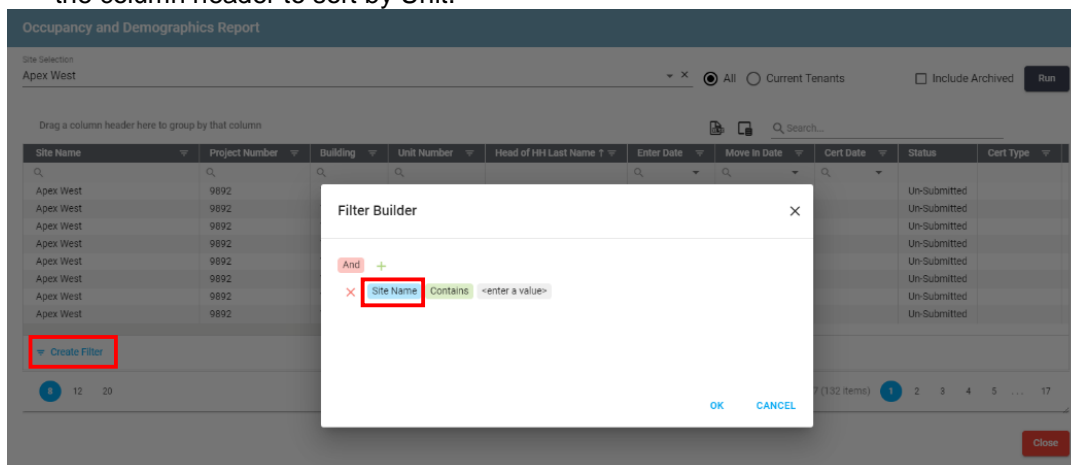
- Q: When pulling the Occupancy and Demographics report is there a reason the list of units appears in random order and is there a way for them to show in order?**
A: The report is generated in random order. However, the data can be sorted within the system by clicking on the applicable column headers. This information can also be exported to Excel to sort and filter as needed.
- Q: How can you just show the information that used to be on the occupancy report?**
A: Users have the option to use the Column Chooser function to remove columns and then export the results to Excel. The option to save custom views that was available in the old system (WTCMS), does not exist in HDS NextGen.

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Reporting...continued

Q: What do you click to add filters on the Tenant Report? How do I sort units in order?

A: At the bottom left of the Occupancy and Demographics Report, the user will need to click on the “Create Filter” button in order to apply filters to the generated report. The user can click on the column header to sort by Unit.



Q: Where do you go to print off a report on who will be coming up for recertification?

A: HDS NextGen does not have a recertification report. We recommend that you generate an Occupancy and Demographics Report and then export it into Excel. Compare the move-in date column with the certification date column and it will show the tenants that need to be recertified and on what date.

Q: I have to go to tenant > reports > and print from there instead of directly from the tenant page.

A: Users can print the TIC from the Tenant Certification screen, as well as the TIC Report screen. If this is not the case, contact us at HDSAdmin@VirginiaHousing.com for assistance. Include a description in the email subject line, along with your site name.