Introduction to HDS Multifamily Web Compliance

Welcome to the Housing and Development Software Multifamily (MF) Web Compliance module. HDS MF Web Compliance allows property managers to enter tenant information directly into a web-based compliance reporting system.

This document is intended for users accessing their agency's MF Web Compliance module.

About HDS MF Web Compliance

Using HDS MF Web Compliance, you can:

- view and edit property, building, unit, and household information
- upload tenant data
- enter and submit certifications
- create printable reports

Browser Settings: Microsoft Internet Explorer 8 and 9

If using Microsoft's Internet Explorer 8 or 9, you will need to turn off the **Compatibility View** feature before using HDS MF Web Compliance.

1. Open the browser.
2. Click the **Tools** menu and select **Compatibility View Settings**.
3. Verify that **Display all websites in Compatibility View** is unchecked.
4. Click the **Close** button

Logging In

To begin using the HDS MF Web Compliance system, open your web browser and navigate to the agency's HDS MF Web Compliance address.

- ***Not yet registered?*** Click the **Register** link; see the section titled Registering as a Compliance User.

- ***Already a registered?*** Enter your **User Name** and **Password** then click **Login** to begin using the application.
    - If you are only managing tenant compliance information, you will see My Properties, where you can start the process.
    - If you are performing other duties, you will see Home, where you can select a perspective to use.

Registering as a Web Compliance User

If you are not yet a registered Web Compliance user:

1. Click the **Register** link in the Login page.
2. In the Registration page, enter information about your self in the **Profile** section:
    - **First Name**
    - **Last Name**
    - **Email:** Where communications will be sent.
    - **Username:** The name you want to use to log in.
    - **Password:** Remember that the password is case sensitive.
3. Type your password again in **Confirm Password**, exactly as you typed it into the **Password** field. You will need this to log in.
4. Enter information about your **Organization**:
    - **Name**
    - **Role:** Your role at the organization.
    - **Address**
    - **City**
    - **State**
    - **ZipCode**
    - **Phone**
5. Use the **Properties** section add the properties for which you are responsible. (This is optional; you can contact the agency later to be assigned to a property.)
    0. Enter the property number in the **Number** field and click **Add**.
    1. Every property you request will be listed by their **Number** and **Name**.
    2. Click **Remove** to remove the request for that property.
6. Click **Submit Registration**. Your request will be sent to the agency for approval.

Forgot Your Password?

If you already registered, but forgot your password, click the **Forgot Password** link.

Resetting Your Password

In the Password Reset page:

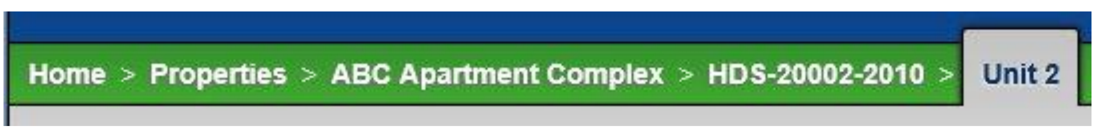
1. Enter the **User Name** and **Email Address** with which you registered.
2. Click the **Send Password Reset** button.

If the **User Name** and **Email Address** match agency records, an email will be sent which contains a link to the Change Password page. ***This link will only be good for two (2) hours.***

1. In the Change Password page, type in the **New Password**.
2. Type in the **New Password (again)**. This must match the **New Password** exactly.
3. Click **Change Password** to complete the process.

Navigation

HDS MF Web Compliance provides a navigation bar for easy navigation through the system.



The navigation bar:

- shows you where you are within the system in relation to parent records
- displays the name of the property, building, unit, and household you're working on

Paths in the navigation bar are displayed as a *breadcrumb trail* (e.g., Properties > Property > Building > Unit...).

Every *breadcrumb* except the last (highlighted in gray) is a link. Click that link to return to that record or page.

My Properties

You can see a list of the properties you can manage in My Properties. From here you can:

- Access individual property records.
- Create a properties report, which you can print or save, that includes this information.

Accessing Property Records

To access a property's information, click the **View** link for the property. This takes you to the Property Details, where you can get an overview of all the buildings in a property.

Creating a Report to Print or Save

To create a report, see the section titled Creating Reports.

The property records report can include the following information:

- **Property Name**
- **Property Number:** ID number.
- **Unit Count:** Total number of unit records, vacant or occupied, for this property.
- **Vacant Units**

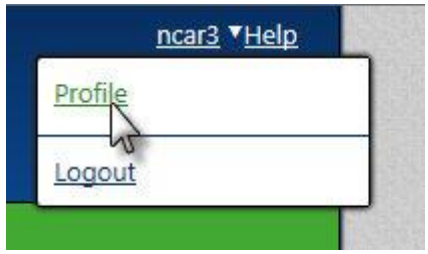
Your Profile

Your user profile includes the information you entered when you first registered. In the Profile page, you can

- review your current profile information
- edit your profile
- change your password

Viewing Your Profile

1. Hover the pointer over your user name at the top of the page.
2. Click the **Profile** link the menu that appears.



You will be able to see your profile at that point. From there you can edit your profile and change your password.

Editing Your Profile

1. While viewing your profile, click the **Edit Profile** link under **Actions**.
2. Change any appropriate information.
3. When finished, click **Save** under **Actions**. (**Cancel** discards unsaved changes.)

Changing Your Password

1. While viewing your profile, click the **Change Password** link under **Actions**.
2. Enter the **Current Password** and **New Password**.
3. Enter the **New Password**.
4. Type in your password again **Confirm New Password**.
5. Once finished, click **Change Password** under **Actions.** (**Cancel** discards unsaved changes.)

Property Details

You can see a list of all the buildings in a property or project in the Property Details. Here you can:

- Get an overview of the property.
- Access individual building records.
- Upload tenant data.
- Access occupancy and demographics information.
- Create a property buildings report, which you can print or save, that includes this information.

To get here:

- Select a property in My Properties and click **View**.
- Click the property name in the navigation bar.

Overview

The **Overview** section shows a information about the units and the property.

- **Unit Count:** Total number of unit records, vacant or occupied, for this property.
- **Vacant Units**
- Whether this property qualifies as **Scattered Site** housing.

Buildings

Accessing Individual Building Records

To access a building's information, click the **View** link for the building. This takes you to the Building Details, where you can get an overview of all the units in a building.

Creating a Report to Print or Save

To create a report, see the section titled Creating Reports.

The property details report can include the following information:

- **BIN:** Building Identification Number.
- **Name** of the building.
- **Address**
- **Unit Cap:** The maximum number of units in the building.
- **Unit Count**
- Whether the unit is **Vacant**.

Actions

- **Upload Tenant Data** using an XML file. Note that all buildings and units for the project should be created ***before*** uploading data.

Places

- **Occupancy and Demographics Report**, information on a building's tenants.

Building Details

You can see a list of all the units in a building in the Building Details. Here you can:

- Get an overview of the building.
- Access individual unit records.
- Add a new unit record to the building.

To get here:

- Select a building in Property Details and click **View**.
- Click the building name in the navigation bar.

Overview

The **Overview** section shows a quick view of the units in the building.

- **Unit Cap:** The maximum number of units for the building.
- **Unit Count:** Total number of unit records, vacant or occupied, for this building. The **Unit Count** should not exceed the **Unit Cap**.
- **Vacant Units**
- If **Locked**, building information cannot be edited.

Units

Accessing Individual Unit Records

To access a unit's information, click the **View** link for the unit. This takes you to the Unit Details, where you can get an overview of the unit and its households history.

Creating a Report to Print or Save

To create a report, see the section titled Creating Reports.

The building details report can include the following information:

- Unit **Number**
- **Bedrooms**
- **Square Feet**
- Whether the unit is **Vacant**
- Whether this is a **Section 8** unit.
- Whether this is a **HOME** unit..

Actions

- **Add Unit:** Click to open the Add Unit action, where you can enter the physical details of a unit. This information can be edited using the Edit Unit action in the Unit Details page.

Adding a Unit to a Building

1. Click the **Add Unit** link in the Action section of the Building Details page.
2. Enter the **Unit Number**. (This must be numeric and cannot already be used in the building by another unit.)
3. Enter the **Square Feet**.
4. Select the **Unit Type**.
5. Place a check in **HOME** if this is a HOME unit.
6. Click **Submit** to create the unit, or **Cancel** to close without saving.

IMPORTANT: The total number of units in a building cannot exceed the **Unit Cap**. If the **Unit Count** is equal to the **Unit Cap**, you will not be able to add any more units. Contact your agency for details.

Unit Details

You can see an overview of a unit, including physical characteristics and household listing in the Unit Details. Here you can:

- Get an overview of the unit.
- Access individual household records.
- Edit a unit's details.
- Enter a certification for the unit.

To get here:

- Select a unit in Building Details and click **View**.
- Click the unit number in the navigation bar.

Overview

The **Overview** section shows a quick view of the unit's physical characteristics and assistance type.

- **Number of Bedrooms**
- **Square Feet**
- Whether the unit is **Vacant**
  - **For non-Section 8 units,** vacancy is determined by the latest submitted certification in the unit.

    - **For Section 8 units,** vacancy is determined by TRACS.
- Whether this is a **Section 8** unit.
- Whether this is a **HOME** unit.

Households

Accessing Individual Household Records

To access a household's information, click the **View** link for the unit. This takes you to the Unit Details, where you can get an overview of the unit and its households history.

Creating a Report to Print or Save

To create a report, see the section titled Creating Reports.

The unit households report can include the following information:

- **Last Name**
- **Date First Occupied**
- **All Submitted**: Whether all the certifications for the units have been submitted.

Actions

- **Edit Unit:** Edit the physical details and HOME status of this unit.
- **Occupy Unit:** Create a new *Initial* or *Move-In* certification for this unit. *For vacant, non-Section 8 units only.*
- **Unit Transfer:** Create a *Unit Transfer* certification which moves the occupant from one unit to another within the same building. *For non-Section 8 units, see the note below.*
- **Move Out:** Creates a *Move-Out* certification and marks the unit as Vacant. *For non-Section 8 units, see the note below.*
- **Recertify:** Create an annual *Recertification*, an *Interim* certification, or a new *Initial* certification (in cases where changes to the household make this necessary).

The **Occupy Unit**, **Unit Transfer**, **Move Out**, and **Recertify** actions will not appear if **All Submitted** is unchecked for any household in this unit. That's because new certifications can't be created if an unsubmitted certification is still present for the unit. See Submitting a Certification to learn how to submit a certification.

Note: Non-Section 8 Units and Unit Transfer/Move Out Certifications

The **Unit Transfer** and **Move Out** actions will only appear for non-Section 8 units if both of the following conditions are met:

- The most recent certification for that household has been completed.
- The most recent certification is not a vacating certification (*Unit Transfer, Move Out*).

Edit Unit

The Edit Unit action lets you edit the physical details and HOME status of a unit.

Editing a Unit Record

To edit a unit's physical details:

1. Click **Edit Unit** in the **Actions** section of the Unit Details page.
2. Enter the unit's **Number**. This number:
   - must be numeric
   - cannot be in use by another unit in the same building.
3. Enter the **Square Feet**.
4. Select the **Unit Type**.
5. Check the **HOME** box if the unit is a HOME unit.
6. Click **submit**, or **cancel** to discard unsaved changes.

Occupying a Unit

Before you start, remember:

- *Initial* and *Move In* certifications can only be created for vacant, non-Section 8 units.
- New certifications can't be created if there are unsubmitted certifications for the unit. See the *Actions* section in the *Unit Details* help page for details.

To occupy a unit:

1. Click **Occupy Unit** in the **Actions** section of the Unit Details page. A pop-up opens.
2. Enter the **Certificate Type**, *Initial* or *Move In*.
3. Enter the **Effective Date**.
4. Click **submit**, or **cancel** to stop the process.
5. Enter the details of the new certification into the page that opens. Information is divided into three sections:
   - Overview
   - Members
   - Income & Assets
6. When finished with those, click **save** to save the new certification, or **cancel** to stop the process.

After you finish this process, you can see and work with the certification just created.

NOTE: Creating a certification is not the same as submitting a certification. To submit a certification, see *Submitting a Certification*

Overview

The Overview section of the New Certification is where you first enter the **Rent**, **Income** classification, **Demographic**, and **Program** information for a household certification.

To get here:

- Click **submit** after starting the process to Occupying a Unit.

You can enter the following information here:

- **Rent**
  - Monthly **Tenant Paid Rent** amount, for rent and utilities.
  - **Utility Allowance** amount, in cases where utilities are not included in the rent.
  - **Utility Type** for which the allowance is received.
  - **Rent Designation** of the unit based on the Multifamily Tax Subsidy Projects (MTSP) rent limits.
  - **Rental Assistance** amount.
  - **Assistance Type** being provided to the tenant.

- **Income**
  - MTSP **Income Designation** of the unit.

- **Demographics**
  - **Household Type**
  - **Social Services** provided to the tenant.
  - **Single-Parent** status.
  - **Student Code**

- **Programs:** Program types for which the household qualifies. See *Adding a Program* for details.
  - **Program** name.
  - **HUD Type**
  - **Income Status** of the household.

Adding a Program

1. Click the **Add Program** link. A pop-up opens.
2. Select the agency **Program**. The **HUD Type** will be automatically shown.
3. Select the **Income Status**, or enter one manually. Options change according to **HUD Type**.
4. Click **OK** so save the information, or **Cancel** to discard changes.

Members

The Household Members section is where you add information on all members of the household to the certification.

To get here:

- Click **submit** after starting the process to Occupying a Unit then click the **Members** tab.

In the **Members** section, you can:

- see the **Member** name and the **Relationship** to the head of household
- add, edit, and delete household members from the certification

Adding a Household Member

1. Click **Add Members** below the **Members** section.
2. Enter the following **Details**:
   - **First Name**
   - **Middle Initial**
   - **Last Name**
   - **Relationship** to the head of household.
   - Last four (4) digits of the social security number (**SSN**).
   - **Alien Registration Number**
   - **Races** the member identifies as.
   - **Ethnicity**
   - **Birth Date**
   - **Marital Status**
   - **Gender**
   - Any **Special Status** that applies to the member. Note that the *Student* status is defined here for Tax Credit certifications only. For Section 8 certifications, use **LIHTC Student**.
   - **LIHTC Student**: For Section 8 certifications only.
   - **Occupation**
   - **Source of Income**

Information is automatically saved as it's entered, so you can safely move to another household member record, or even to another tab before clicking **Save**.

If you click **Cancel** to exit the New Certification page, all changes will be discarded.

Editing a Household Member

1. Click **edit** link next to the household member's name.
2. Edit the **Details**. This is the same information described in the *Adding a Household Member section.*
3. Click **save** to finish, or **cancel** to discard all unsaved changes.

Deleting a Household Member

1. Click **delete** next to the household member name.
2. Click **save** to commit the deletion, or **Cancel** to cancel the deletion.

Once a member record is deleted from the certification all information associated with that member will be removed from the certification, including income and asset information.

Income and Assets

The Income & Assets section is where you add **Income**, **Assets**, and **Deductions** information for any household members.

To get here:

- Click **submit** after starting the process to Occupying a Unit then click the **Income & Assets** tab.

Working with Incomes

Adding an Income

1. Click **Add Income** in the **Income** section.
2. In the pop-up, enter the following:
    - **Member**
    - **Source**
    - Annual **Amount**.
3. Click **OK**. (**Cancel** discards unsaved changes.) The pop-up closes.
4. Click **Save**.

Editing an Income

1. Click **Edit** for the household member and income in the **Income** section.
2. Edit the information in the pop-up.
3. Click **OK**. (**Cancel** discards unsaved changes.) The pop-up closes.
4. Click **Save**.

Deleting an Income

1. Click **Delete** for household member and income in the **Income** section.
    - The income will be shown as stricken. Click **Undelete** to reverse the deletion.
2. Click **Save**. Once you click **Save**, you cannot **Undelete** an income.

Working with Assets

Adding an Asset

1. Click **Add Asset** in the **Assets** section.
2. In the pop-up, enter the following:
    - **Member**
    - **Asset Type**
    - **Cash Value**
    - **Annual Income** derived from the asset.

- **Asset Status**
  - ***Current*: ** Currently owned by the household member.
  - ***Imputed*:** Disposed of within the last 24 months.
  - ***Average*:** Currently owned by the household member, but with a fluctuating income.
3. Click **OK.** (**Cancel** discards unsaved changes.) The pop-up closes.
4. Click **Save**.

Editing an Asset

1. Click **Edit** for the household member and asset in the **Assets** section.
2. In the pop-up, edit the information.
3. Click **OK**. (**Cancel** discards unsaved changes.) The pop-up closes.
4. Click **Save**.

Deleting an Asset

1. Click **Delete** for the household member and asset in the **Assets** section.
   - The asset will be shown as stricken. Click **Undelete** to reverse the deletion.
2. Click **Save**. Once you click **Save**, you cannot **Undelete** an asset.

Working with Deductions

Adding a Deduction

1. Click **Add Deduction** in the **Assets** section.
2. In the pop-up that appears, enter the following:
   - **Member**
   - **Deduction Type**
   - **Amount**
3. Click **OK**. (**Cancel** discards unsaved changes.) The pop-up closes.
4. Click **Save**.

Editing a Deduction

1. Click **Edit** for the household member and deduction in the **Deductions** section.
2. In the pop-up, edit the information.
3. Click **OK**. (**Cancel** discards unsaved changes.) The pop-up closes.
4. Click **Save**.

Deleting a Deduction

1. Click **Delete** for the household member and deduction in the **Deductions** section.
   - The income will be shown as stricken. Click **Undelete** to reverse the deletion
2. Click **Save**. Once you click **Save**, you cannot **Undelete** a deduction.

Unit Transfer

The Unit Transfer action lets you to create a *Unit Transfer* certification, moving a household from one unit to another within the same building.

Creating a Unit Transfer Certification

Before you start, remember:

- New certifications can't be created if there are unsubmitted certifications for the unit. See the *Actions* section in the *Unit Details* help page for details.
- *Unit Transfers* can only be created if the most recent certification is not a vacating certification (*Unit Transfer Out, Move Out*).

To create a *Unit Transfer* certification:

1. Click **Unit Transfer** in the **Actions** section of the Unit Details page. A pop-up opens.
2. Select the **Certificate Type**, *Initial* or *Move In*.
3. Select the **Effective Date**.
4. Click **submit**, or **cancel** to stop the process.

After clicking **submit**:

1. A *Transfer Out* certification appears in the Household Details page for the old unit. That unit will be marked as *Vacant*.
2. A *Transfer In* certification appears in the Household Details page for the new unit. That unit is marked as *Occupied*.
3. The *Transfer In* certification record for the new unit opens. There you can:
   - edit the certification's details
   - submit the certification.

Move Out

The Move Out action allows you to create a *Move Out* certification for a unit, thereby vacating the unit.

Creating a Move Out Certification

Before you start, remember:

- New certifications can't be created if there are unsubmitted certifications for the unit. See the *Actions* section in the *Unit Details* help page for details.
- *Move Outs* can only be created if the most recent certification is not a vacating certification (*Unit Transfer Out, Move Out*).

To create a *Move Out* certification:

1. Click **Move Out** in the **Actions** section of the Unit Details page. A pop-up opens.
2. Select the **Effective Date**.
3. Click **submit**, or **cancel** to stop the process.

After clicking **submit**:

- a *Move Out* certification appears in the Household Details for that household. That unit is marked as *Vacant*.

Recertify

The Recertify action lets you:

- create a *Recertification* certification for a unit
- create an updated *Initial* or *Interim* certification, should household changes make this necessary before the annual recertification.

Creating a Recertification

Before you start, remember:

- New certifications can't be created if there are unsubmitted certifications for the unit. See the *Actions* section in the *Unit Details* help page for details.

To create a *Recertification*:

1. Click **Recertify** in the **Actions** section of the Unit Details page. A pop-up opens.
2. Select the **Certificate Type**, *Recertification*, *Initial*, or *Interim*.
3. Select the **Effective Date**.
4. Click **submit**, or **cancel** to stop the process.

After clicking **submit**, the recertification's information appears.

- The system copies the information from the most recent previous certification to the recertification.
- A new certification record of the type recertified shows up in the Household Details page for that household.

Household Certifications

You can see a list of all certifications that a household has had across all the units it has occupied in a property. Here you can:

- get a listing of a certifications for a household
- access individual certifications
- create a printable certifications listing report for the household.

To get here:

- Select a household in Unit Details and click **View**.

- Click the household name in the navigation bar.

Certifications

Accessing Individual Certifications

To access a certification, click the **View** link for that certification. This takes you to the Certification's details for the latest version of that certification.

Creating a Report to Print or Save

To create a report, see the section titled Creating Reports.

The household certifications report can include the following information:

- The certification **Type**..
- **Effective Date**
- **Family Size**
- **Income** at the time of certification
- **Unit** number
- Whether this is a **Section 8** unit

Certifications

The Certification includes all of the information required by the agency. Here you can:

- review the certification's details
- edit, submit, correct, and delete a certification
- access the Tenant Income Certification report

To get here:

- Select a certification in Household Details and click **View**.
- Click on the certification's date/type in the navigation bar.

Reviewing Certification Information

Certification information is divided into the following sections:

- an Overview of the household
- a listing of household Members
- a listing of Income & Assets
- the certification's History

Follow any of those links for details on each of those sections.

Actions

- **Edit Certification:** This action is not available after the certification has been submitted to the agency.

- **Submit Certification:** Click this after verifying that the information on the certification is accurate and ready to send to the agency.
- **Correct Certification:** Creates a certification correction that can be submitted to the agency. Corrections are listed in the History section.
    - Visible after a certification has been submitted.
    - Cannot be performed for the following certification types: *Move Out*, *Transfer In*, or *Transfer Out*.
    - Cannot be performed if there are any unsubmitted certifications for the unit.
- **Delete Certification:** Any non-TRACS certification that is not *Submitted* can be deleted. Clicking **Yes** in the notification pop-up that appears after clicking this action will delete the certification.

NOTE: If you need to unsubmit a certification, contact the agency. It is up to the agency to determine whether a certification can be unsubmitted, or whether a correction must be entered, instead.

Places

- **Tenant Income Certification:** Lists all of the information required by the agency to help determine maximum income eligibility for a household, and to see whether an applicant can live in an LIHTC unit.

Overview

The Certification Overview displays an overview of the certification for a unit. It includes a breakdown of the **Rent**, **Income** classification, **Demographics**, and **Program** information for a household certification.

To get here:

- Select a household in Unit Details and click **View**.
- Click the household name in the navigation bar.

The Overview section includes the following information:

- **Head of Household** name
    - Number of **Family Members**
    - **Move-In Date**
    - **Number of Bedrooms**

- **Rent**
    - Monthly **Tenant Paid Rent** amount, for rent and utilities.
    - **Utility Allowance** amount, in cases where utilities are not included in the rent.
    - **Utility Type** for which the allowance is received.
    - **Rent Designation** of the unit based on the Multifamily Tax Subsidy Projects (MTSP) rent limits.

  - **Rental Assistance** amount.
    - If the amount is underlined, an income limit override is in place affecting this amount. Hover your pointer over the amount to see the override's details.
  - **Assistance Type** being provided to the tenant.

- **Income**
  - Total **Household Income**
  - MTSP **Income Designation of the unit.**
  - MTSP **Income Limit** classification amount for the household size for the county in which the unit is located.
    - If the amount is underlined, an income limit override is in place affecting this. Hover your pointer over the amount to see the override's details.

- **Demographics:** Demographic information for the household.
  - **Household Type**
  - **Social Services** provided to the tenant.
  - **Single-Parent** status.
  - **Student Code**

- **Programs:** Program types for which the household qualifies.
  - **Program** name.
  - **HUD Type**
  - **Income Status** of the household

Members

The Members section displays information on all household members. Click the **Members** tab to display this screen.

To get here:

- Select a household in Unit Details and click **View**. Finally, click the **Members** tab.
- Click the household name in the navigation bar then click the **Members** tab.

The Members information is divided into the following sections:

- **Members:** Click the **View** button next to a household member to display the member's details in the **Details** section.
  - **Member**
  - **Relationship** to the head of the household.
- **Details:** Note that not all fields shown here may appear in this section for all household members.
  - **Relationship** to the head of household.
  - **SSN:** Last four (4) digits.
  - **Birth Date**

- **Gender**
- **Race**
- **Occupation**
- **Source of Income**
- **Total Income**
- **Total Asset Income:** Total income from the assets.
- **Total Deductions:** Total amount deducted from the income.

- **Summary**
  - How many **Family Members** in the household.
  - **Adults with Income**
  - **Dependents Under 18**
  - **Occupants 62 and Over**
  - **Student Head of Household**
    - Determined for Tax Credit certifications by selecting *Student* in the **Special Designation** field when Editing a Certification.
    - Determined for Section 8 certifications by selecting *Yes* in the **LIHTC Student** field when Editing a Certification.
  - Total **Full-time Students**

Income and Assets

The Household Income & Assets section displays asset, income, and deduction information for all household members.

To get here:

- Select a household in Unit Details and click **View**. Finally, click the **Income & Assets** tab.
- Click the household name in the navigation bar then click the **Income & Assets** tab.

The Income & Assets information is divided into the following sections:

- **Income**
  - **Member**
  - **Income Source**
  - **Amount**
- **Assets**
  - **Member** who owns the asset.
  - **Type**
  - **Status**
    - ***Current***: Currently owned by the household member.
    - ***Imputed***: Disposed of within the last 24 months.
    - ***Average***: Currently owned by the household member, but with a fluctuating income.
  - **Cash Value**

    - **Annual Income** derived from the asset.
        - The asset's income **Cash Value Total (if over $5000)**.
        - **Passbook Rate** used by HUD to calculate accrued asset income.
        - **Imputed Income** from assets.
- **Deductions**
    - **Member**
    - **Type**
    - **Amount**.
- **Summary:** Combined totals for all household members.
    - **Total Income**
    - **Total Asset Income**
    - **Total Deductions**

History

The HDS MF Web Compliance system maintains a history of the certification, including when it was created and edited. For corrections, this means a list of all the prior versions is displayed, each item with a link to the corresponding version, so you can compare them to see what changed.

To get here:

- Select a household in Unit Details and click **View.** Finally, click the **History** tab.
- Click the household name in the navigation bar then click the **History** tab.

The History is divided into the following sections:

- **History:** Date and time the certification was created and when it was last edited.
- **Prior Versions** of the certification. Click the **View** link to see that version. Any time a certification correction is created and submitted, it will be listed here.
    - **Prior Certification Date** submitted
    - **Created On:** Date that prior certification was created.
    - **Created By:** Who created that prior certification.
    - **Edited On:** Date that certification was edited.
    - **Edited By:** Name of the person who edited that certification.

ACTIONS

Editing a Certification

Before you begin, remember:

- Certifications can only be edited before they're submitted. Once a certification has been submitted, you can't edit the certification. Instead, you will need to:
    - enter a correction, or
    - contact the agency and request that the certification be unsubmitted.

To edit an unsubmitted certification:

1. Click **Edit Certification** under **Actions** in the Certification. This makes the certification information editable.
2. Make the necessary changes in the following sections:
   - Overview (edit)
   - Members (edit)
   - Income & Assets (edit)
3. Click **Save**. (**Cancel** discards unsaved changes.)

When finished, the fileds will once again be read-only.

A Note for Section 8 Certifications: For Section 8 certifications, items are read-only unless otherwise specified in this help file.

Submitting a Certification

Before submitting a certification, please review all information and make sure its correct. Once a certification is submitted it cannot be unsubmitted without direct intervention from the agency.

To submit a certification:

1. Click **Submit Certifications** in the **Actions** section of the Certification.
2. In the pop-up that appears, click **next**. This submits the certification to the agency.

If you realize that changes need to be made to the certification you can:

- create and submit a correction
- contact the agency and request that the certification be unsubmitted.

Correcting a Certification

Before you begin, remember:

- **Correct Certification** is not available for unsubmitted certifications. If a certification has not yet been submitted, use the Edit Certification action.

To correct a submitted certification:

1. Click **Correct Certification** under **Actions** in the Certification. This creates a new (unsubmitted) correction certification.
2. Make the necessary changes in the following sections:
   - Overview (edit)
   - Members (edit)
   - Income & Assets (edit)

3. Click **Save**. (**Cancel** discards unsaved changes.)

Once the corrections have been made, you may submit the correction just like you would any other certification.

A Note for Section 8 Certifications: For Section 8 certifications, items are read-only unless otherwise specified in this help file.

Deleting a Certification

Before you start, remember:

- Only unsubmitted certifications can be deleted. Submitted certifications *cannot be deleted*.
- The certification must be the latest version. (If corrected, it must be the latest correction.)
- It cannot be a Section 8 certification.

To delete an unsubmitted certification:

1. Click **Delete Certification** under **Actions** in the Certification.
2. In the pop-up that appears, click **yes**. ***All deletions are final.***

Once the certification is deleted, you will be returned to the Unit Details page.

Places

Tenant Income Certification

The Tenant Income Certification (TIC) report lists all of the information required by the agency to help determine maximum income eligibility for a household, and to see whether an applicant can live in an LIHTC unit.

To get here:

- Click **Tenant Income Certification** under **Places** in the household Certification.

Saving or Printing the Tenant Income Certification Report

- To print the entire report, click .
- To print a specific page:

   1. Go to that page using the 

.

2. Click .

- To save the entire report to your computer:

1. Select the export format using the dropdown.
2. Click .

- To save a specific page to your computer:

1. Go to that page using the .
2. Select the export format using the dropdown.
3. Click .

Uploading Tenant Data

To make data entry easier, you can upload tenant information to the agency's database using an XML file.

IMPORTANT: All buildings and units for the project should be created ***before*** uploading data.

1. In the Property Details **Actions** click **Uploading Tenant Data.**
2. In the Upload Tenant Data pop-up, click the **Browse** button.
3. Using the window that appears, select the XML file to upload.
4. In the Upload Tenant Data pop-up, click **Upload.** (Click **Close** to exit without uploading any data.)

After uploading the Upload Report Results will show the status of uploaded records. These results can be exported as described in the section *Creating Reports*.

NOTE: XML files are generally exported from property vendor software using industry standards for this type of information. For any questions, please contact the agency.

Occupancy and Demographics Report

The Occupancy and Demographics report shows occupancy and demographic information for a property's tenants, and lists all of the certifications for that property.

To get here:

- In the Property Details, under **Places**, click **Occupancy and Demographics Report**.

Creating a Report to Print or Save

To create a report, see the section titled Creating Reports.

The Occupancy and Demographics Report can include the following information about each certification. Note that there may be multiple certifications for a unit and a household.

- **Unit Number**
- **Building**
- **Head of HH Last Name**
- **Enter Date:** Date any special claims were entered.
- **Move-In Date**
- **Cert Date** of the latest certification.
- **Cert Type** of the latest certification.
- **# Occupants** in the household.
- **# Students** in the household.
- **# Bedrooms** in the unit.
- **Sqft:** Square footage.
- **Rent**
- **Utility Allowance**
- **Gross Rent:** Calculated as ***Rent*** plus ***Utility Allowance****.*
- **Income at Move-In** total for the household at the time of the *Move In* certification.
- **Annual Income** total for the household at the time of the current certification.
- **# Elderly** in the household.
- **# Children** in the household.
- Is this a **Single Parent** household?
- **Gender** of the Head of Household (HOH).
- **# Income Adult:** Number of adults in the household who earn income.
- **Income Source** of the HOH.
- **Head of HH Occupation**

- **Disability** status of the HOH (Yes/No).
- **Racial Identity** of the HOH.
- **Owner Income Designation:** Owner-reported income classification of the unit.
- Monthly **Subsidy** amount.
- If this is a **HOME** unit.

Creating Reports

You can save the information you see on some HDS MF Web Compliance pages to reports you can later print.

To create a report you can save or print, first go the page containing the information you want to include in the report. *Note that the page MUST contain a grid, such as in the Occupancy and Demographics Report or My Properties.*

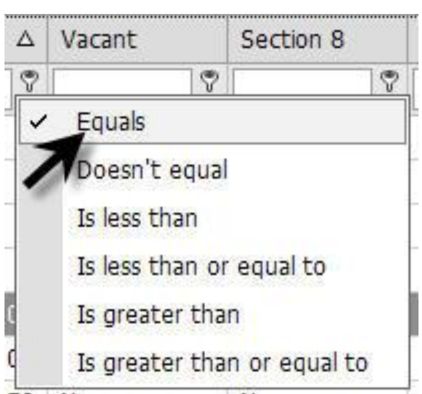
To save a report as it currently appears:

1. Select the **Export Format**.
2. Click **Export**.

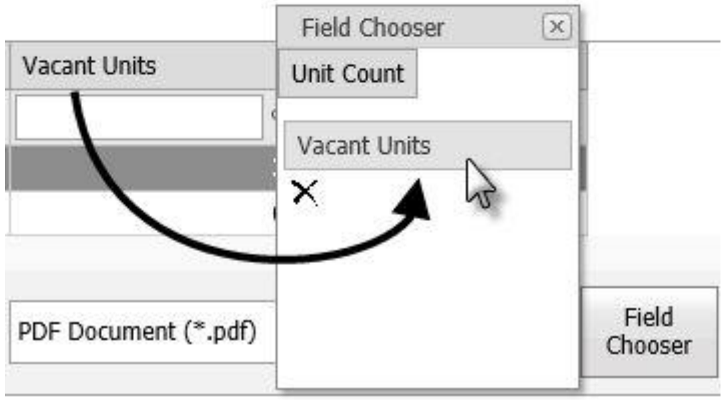
If you want to select what information will and won't be included in the report, and how it will be displayed, you can do any of the following:

- Choose what information will be in the report by using the **Filter**.

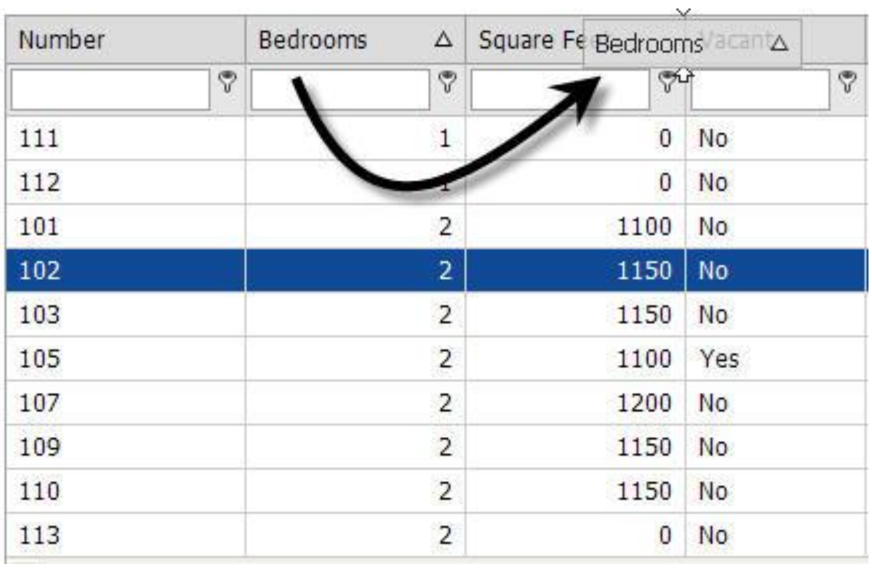
  1. Select the filtering type (*Equals, Doesn't equal,* etc.)
  2. Enter the value into the blank field (e.g., "Smith", "1200", etc.)



- Click on the **Field Chooser** button below the grid to add or remove information to include in the report.



- Move the columns around so that the information is in the order you want it.



Number	Bedrooms	Square Fe	Bedrooms Vacant
111	1	0	No
112	1	0	No
101	2	1100	No
102	2	1150	No
103	2	1150	No
105	2	1100	Yes
107	2	1200	No
109	2	1150	No
110	2	1150	No
113	2	0	No

After setting up the report:

1. Select the **Export Format**.
2. Click **Export**.