CERTIFICATION PORTAL (CP)

Formally known as: Certification Online (COL)

A HOW-TO GUIDE FOR ANNUAL REPORTING
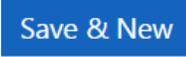
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JULY 2020

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LEGEND

🏠	Return to the Landing Page (Snapshot)
▼	Search or Sort
⟳	Undo, Clear search
Q	Review/Select
💾 Save	Save entry
Save & New	Save entry and create additional entries
Save & Close	Save entry and close screen
Edit	Make changes
Cancel	Delete entry and go back to previous screen
(Excel icon)	Export to Excel
(Word icon)	Export to Word
☑	Submit to MHDC
✖	Delete Record

SECTION 1

LOGGING IN
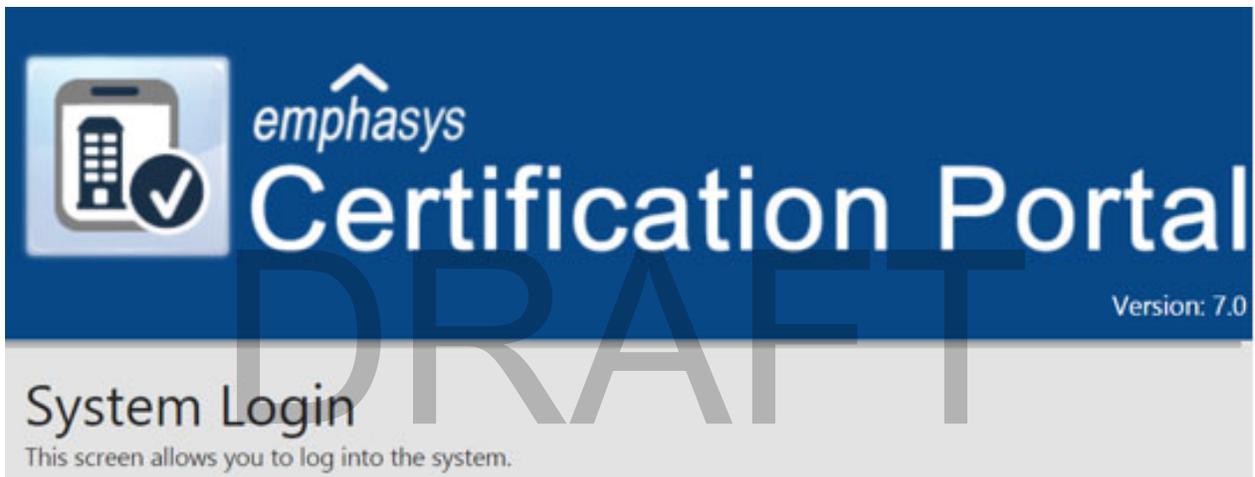
New (Super) User

If you are a new user who will have full control (Super User) of the CP, contact MHDC for a User ID and Password.

New Non-Super User

If you are a new user assigned by the Super User, the Super User will set up your User ID, Password and assign specific projects to you. Contact your Super User for log in credentials.

New super and non super users will login using the MHDC assigned User ID and Password at the SYSTEM LOGIN page.
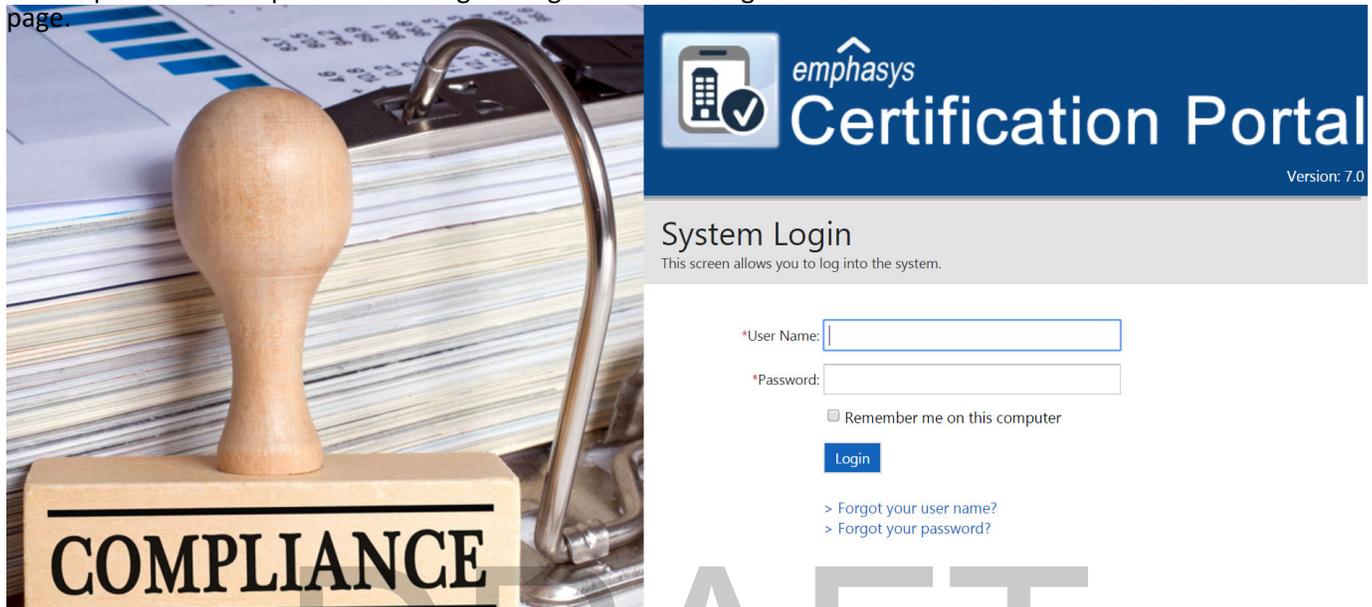
New Super and Non-Super User

This screen will then appear and require the user to create a new User ID and Password.
NOTE: The username and password fields require at least 6 characters and are case sensitive.

Once new credentials are created and logged in, user will see the Landing Page (Snapshot)

EXISTING (COL) User

 Enter e-mail address and click

Recover Login Credentials
Please enter your email address in the box below.

Submit   Cancel

> Forgot your password? Enter e-mail address and click Submit

Recover Login Credentials

Please enter your email address in the box below.

Submit   Cancel

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End of Section 1

SECTION 2

ACCESSING PROJECTS

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Once logged into CP, the user will be on the LANDING PAGE (Snapshot) and can access projects using five different options.

Option 1: Click on View All

Option 2: Click on Projects

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

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

Project ID: [_____] ⬅
Project Name: [_____] ⬅
Grantee Number: [_____] ⬅
IDIS Activity Number: [_____] ⬅

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

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

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

Option 5: Click on [Projects]

This will take you to a list of projects that have been assigned to the user.

Project ID	Project Name	Annual Owner Certification		Buildings	Contact Us
		Status	Last Submission Date		
00-18	WINTER SOLSTICE 754 Icicle Way, SPIRIT LAKE, IA 513600000	Not Submitted	01/19/2018	2	@

Projects
Showing 1 - 1 of 1 records

Import All Building Data | Upload Files | Annual Owner Certification | Proceed to Buildings

Results for: Project ID: 00-18 | Clear All

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End of Section 2

SECTION 3

MANUAL ENTRY
NEW MOVE IN

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Select the project the user will be working in. Click Proceed to Buildings

	Project ID	Project Name	Annual Owner Certification		Buildings	Contact Us
			Status	Last Submission Date		
🔍	00-18	WINTER SOLSTICE 754 Icicle Way, SPIRIT LAKE, IA 513600000	Not Submitted	01/19/2018	2	@

Projects
Showing 1 - 1 of 1 records | Import All Building Data | Upload Files | Annual Owner Certification | Proceed to Buildings

Results for: Project ID: **00-18** ✕ | Clear All

Select the building the user is working in. Click on Change Report Period

Project: 00-18 - WINTER SOLSTICE » Buildings
Address: **754 Icicle Way, SPIRIT LAKE, IA 51360-0000**

General Information
Import All Building Data
Upload Files
Annual Owner Certification
Buildings (2)

Import Building Data | View Details | Change Report Period | Submit Tenant Certs | Proceed to Units | Reports | Close

	Building ID	Placed In Service Date	Last Report Date	Current Reporting Period	IRS Compliance Status	HOME Compliance Status	Agency Compliance Status	Tenant Recert Status	Last Submission Date	Units
🔍	IA-00-18001	12/19/2001	12/31/2017	01/01/2018 - 12/31/2018	In Compliance	In Compliance	In Compliance	Ready		12

Enter the Reporting Calendar Year the user is entering unit data for.

Building ID: IA-00-18001 » Change Report Period
Project: **00-18 - WINTER SOLSTICE**

General Information
Import Building Data
Change Report Period
Units
Reports

*New Reporting Period: 01/01/2018 — 12/31/2018

☐ Update All Buildings

💾 Save | Cancel

To update the reporting year for all buildings in the project, check the box ☐ Update All Buildings **and click** 💾 Save

Click on ▸ Units **in the menu on left side of screen.**

▸ General Information
▸ Import Building Data
▸ Change Report Period
▸ **Units**
▸ Reports

Select the unit the user will be working in and click New Tenant Cert

Building ID: IA-00-18001 » Units
Project: **00-18 - WINTER SOLSTICE**

New Unit | Unit Definition | Income & Rent Test | New Tenant Cert | Delete Tenant Certs | Move Out | Unit Transfer | Ready All Units | Close

	Unit ID	No. of Bedrooms	Square Footage	Status	Head of Household	SSN	Last Certification Date	Re-Certification Due Date	Ready to Submit
	09	2	843	Vacant					✔
🔍	10	2	843	Occupied by Tenant	Seb., C.	111-11-1111	12/15/2018		—
🔍	11	2	843	Occupied by Tenant	Ka, J.	111-11-1111	06/01/2018		—

You must complete all applicable boxes on this page.

Enter Member (HOH) name, Birth Date, Sex, Social Security Number, Occupation and Marital Status. Ethnicicity, Race, Disabled are optional/non requried questions for the HOH to respond to. (The questions **are** required to be on the application and the household may choose not to answer).

Enter Move-in Date, New Cert Date, Unit Assistance Type, Owner's Designation and Restriction. Check Non-Qualified Student if household has students that do not meet any exceptions (HOME and/or LIHTC). Initial Certificaiton will automatically check for Initial Certification. Family size and Household Annual Income will auto fill when family data is entered. Check box Ready to Submit when entry is complete. Note that with a new move in, Move in Date and New Cert Date should be the same.

This information is optional in the system and not required by MHDC.

This information will auto fill when a transfer occurs.

```
┌─ Transfer Information ─────────────────────────────────────┐
│                                                            │
│   Transferred From Building:                               │
│                                                            │
│            Old Unit ID:              Old Unit Move-In:      │
│                                                            │
└────────────────────────────────────────────────────────────┘
```

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

When clicking **💾 Save** a menu will open on left side of screen for entering additional household data.

▸ General Information

▸ **Household Members**

▸ Income

▸ Assets

▸ Unit Rent

▸ Household Members

▸ Income

▸ Assets

HOME ONLY projects are not required to enter detail data therefore these 3 links may not be available.

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

Unit: 10, Tenant: Seb., C. » Household Members

Bed	Sq Ft	System Designation	Report Period	Last Report Ending	Building	Project
2	843	**Market Rate**	**01/01/2018 - 12/31/2018**	**12/31/2017**	**IA-00-18001**	**00-18 - WINTER SOLSTICE**

New Member Close

Member Name	SSN	Birth Date	Age	Occupation
There are no household members to show in this view.				

Family Size: **1**   Full-Time Students: **0**

Minors: **0**

Click **New Member**

New Household Member
Adding a new household member to the system.

```
┌─ Household Member (Basic Data) ─────────────────────────────────────────┐
│                                                                          │
│   *Member Name: [            ]    Social Security Number: [        ]      │
│                                                                          │
│   *Birth Date: [        ] 📅            Age:                              │
│                                                                          │
│   *Relation: [          ▼]         Occupation: [            ▼]            │
│                                                                          │
└──────────────────────────────────────────────────────────────────────────┘

┌─ Household Member (Demographics) ───────────────────────────────────────┐
│                                                                          │
│   Sex: [          ▼]              Marital Status: [          ▼]           │
│                                                                          │
│   Ethnicity: [          ▼]                Race: [          ▼]             │
│                                                                          │
│   Special Population: [          ▼]        Disabled: ☐                    │
│                                                                          │
└──────────────────────────────────────────────────────────────────────────┘
```

💾 Save   **Save & New**   **Save & Close**   Cancel

Enter Member Name, Birth Date, Relation, Social Security Number, Occupation.

New Household Member

Adding a new household member to the system.

Household Member (Basic Data)

*Member Name: [   ]   Social Security Number: [   ]

*Birth Date: [   ] 📅   Age:

*Relation: [▼]   Occupation: [▼]

Enter Sex, Marital Status. Ethnicity, Race, Disabled are optional questions for all members. (The questions are required to be on the application and the household may choose not to answer).

Household Member (Demographics)

Sex: [▼]   Marital Status: [▼]

Ethnicity: [▼]   Race: [▼]

Special Population: [▼]   Disabled: ☐

Click **💾 Save** when done with the page or **Save & New** to add additional members or **Save & Close** when ready to move to next unit.

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

Unit: 09, Tenant: Test » Income

Bed	Sq Ft	System Designation	Report Period	Last Report Ending	Building	Project
2	843	Low Income	01/01/2018 - 12/31/2018	12/31/2017	IA-00-18001	00-18 - WINTER SOLSTICE

New Income   Close

	Member Name	Source of Income	Verification	Annual Income
		There are no incomes to show in this view.		

Annual Income: **$0.00**

Annual Asset Income: **$0.00**   Total Annual Household Income: **$0.00**

Click **New Income** to enter household income by Member Name. All boxes with down arrows have drop down selection. All fields must be completed.

New Income

Adding a new income to the system.

Member Information

*Member Name: [▼]

Relation:

Income Source & Amount

Source of Income: [▼]

Annual Income: [   ] **Calculate**

Income Verification

Verification Source: [▼]

Verification Date: [   ] 📅

💾 Save   **Save & New**   **Save & Close**   Cancel

<u>Member Information</u>, click on down arrow to show a list of Member Names. Select name and Relationship.

Member Information

*Member Name: Test ▼ ⬅

Relation: **Head of Household**

<u>Income Source & Amount</u>, click on down arrow to show Source of Incomes. Select type of income. Enter Annual Income for the selected member or use the Calculate button as explained below.

Income Source & Amount

Source of Income: ▼ ⬅

Annual Income: $0.00   Calculate ⬅

User can click on calculate `Calculate` to have system calculate each earned income. Enter Pay Rate, Frequency, Hours per Year and the system will show you the Annual Income. For each income to calculate, user will need to click `Apply`. The calculated incomes will populate the Annual Income box to the Income Source & Amount.

Calculate Annual Income

Pay Rate

$0.00

Pay Frequency

Apply   Cancel

<u>Income Verification</u>, part of income process includes Verificaion Source and Verification Date.

Income Verification

Verification Source: ▼ ⬅

Verification Date: ⬅

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

Unit: 10, Tenant: Seb., C. » Income

Bed	Sq Ft	System Designation	Report Period	Last Report Ending	Building	Project
2	843	**Market Rate**	**01/01/2018 - 12/31/2018**	**12/31/2017**	**IA-00-18001**	**00-18 - WINTER SOLSTICE**

New Income   Close

	Member Name	Source of Income	Verification	Annual Income
☐	Seb., C. Head of Household	Social Security/Pensions	11/06/2017 - Not Verified	$12,852.00
☐	Seb., C. Head of Household	Social Security/Pensions	11/06/2017 - Not Verified	$3,987.96

Annual Income: **$16,839.96** ⬅

Annual Asset Income: **$19.46**   Total Annual Household Income: **$16,859.42**

Click `Save` when done with the page or `Save & New` to add additional incomes or `Save & Close` when ready to move to next unit.

To add all household Assets (if any), click | ▸ **Assets** | on the menu on the left side of the screen.

General Information	**Unit: 10, Tenant: Seb., C. » Assets**	🏠 🖨
Household Members		
Income	Bed Sq Ft System Designation Report Period Last Report Ending Building Project	
Assets	2 843 **Market Rate** 01/01/2018 - 12/31/2018 12/31/2017 IA-00-18001 00-18 - WINTER SOLSTICE	
Unit Rent		

New Asset Close

☐	Member Name	Type of Asset	Verification	Cash Value	Annual Income
☐	Seb., C. Head of Household	Other	11/06/2017 - Not Verified	$4,000.00	$6.00
☐	Seb., C. Head of Household	Other	11/06/2017 - Not Verified	$5,000.00	$0.50
☐	Seb., C. Head of Household	Other	11/06/2017 - Not Verified	$6,000.00	$0.60
☐	Seb., C. Head of Household	Other	11/06/2017 - Not Verified	$1,545.00	$12.36
				$16,545.00	

Annual Income: **$16,839.96**

Annual Asset Income:　**$19.46**　　　　Total Annual Household Income: **$16,859.42**

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

New Asset
Adding a new asset to the system.

⎯ Member Information ⎯

　　*Member Name: [▼]

　　　　Relation:

⎯ Asset Type & Value ⎯

　Type of Asset: [▼]

　　*Cash Value: [ ]

Annual Asset Income: [ ]

⎯ Asset Verification ⎯

Verification Source: [▼]

　Verification Date: [ ] 🗓

💾 Save   Save & New   Save & Close   Cancel

In Member Information, click on down arrow to show a list of Member Names. Select name and Relationship.

⎯ Member Information ⎯

　*Member Name: [Seb., C. ▼] ⬅

　　Relation: **Head of Household**

In Asset Type & Value, click on down arrow to show Type of Asset and select type. Enter Cash Value and Annual Asset Income for the selected member

⎯ Asset Type & Value ⎯

　Type of Asset: [▼] ⬅

　　*Cash Value: [$0.00] ⬅

Annual Asset Income: [ ] ⬅

In Asset Verification, part of Asset Verification includes Verificaion Sourch and Verification Date.

⎯ Asset Verification ⎯

Verification Source: [▼] ⬅

　Verification Date: [ ] 🗓 ⬅

Click when done with the page or to add additional Assets or when ready to move to next unit.

To enter rent data, click on the menu on the left side of the screen.

Click to access Rent fields.

When all data compete for a unit, click to return to Unit screen.

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

Tenant Paid Rent:
This is the actual amount the tenant pays (TPP) for rent.

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

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

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

Gross Rent:
The Gross Rent is the total amount the tenant pays. NOTE: If tax credit only it will include Tenant Paid, Mandatory Charges, and Utility Allowance. If HOME/TC or HOME only it will include all fields.

End of Section 3

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SECTION 4

MANUAL ENTRY
RECERTIFICATION

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For projects that are Mixed Use (have Market Rate units), full recertifications are required throughout the life of the project. For projects that are Mixed Income (have lower targeted units), full recertifications are required on the lower targeted units throughout the life of the project. For HOME, full recertifications are required every 6th year of the Affordability Period).

Select the project and [Proceed to Buildings]

Select the building then click [Proceed to Units]

Select the unit then click [New Tenant Cert]

Household Data

Transfer-In Date: **12/10/2018**	Household Annual Income: **$16,859.42**	*Unit Assistance Type: No Assistance ▼
*New Cert Date: [ ] 🗓 ⟵	Non Qualified Students: ☐	Owner's Designation: LIHTC ▼
Initial Certification: ☐	Family Size: **1**	Restriction: 30/50 (HOME - VLI) ▼
Ready to Submit: ☐		

Contact Information

Home Phone: 000 - 000 - 0000   Work Phone: 712 - 331 - 1884

Email: [ ]

Transfer Information

Transferred From Building: **IA-00-18001**

Old Unit ID: **09**   Old Unit Move-In: **12/01/2018**

[💾 Save] [Save & Close] [Cancel]

Enter New Cert Date *New Cert Date: [ ] 🗓 and click [💾 Save]

Click on member name then [New Income]

Unit: 10, Tenant: Seb., C. » Income

Bed	Sq Ft	System Designation	Report Period	Last Report Ending	Building	Project
2	843	**Market Rate**	**01/01/2018 - 12/31/2018**	**12/31/2017**	**IA-00-18001**	**00-18 - WINTER SOLSTICE**

[New Income] [Close]

☐	Member Name	Source of Income	Verification	Annual Income
☐	Seb., C. Head of Household	Social Security/Pensions	11/06/2017 - Not Verified	$12,852.00
☐	Seb., C. Head of Household	Social Security/Pensions	11/06/2017 - Not Verified	$3,987.96

Annual Income: **$16,839.96**

Annual Asset Income: **$19.46**   Total Annual Household Income: **$16,859.42**

Income » Seb., C. - Head of Household

Source of Income: **Social Security/Pensions**   [Edit] [Close]

Member Information

Member Name: **Seb., C.**

Relation: **Head of Household**

Income Source & Amount

Source of Income: **Social Security/Pensions**

Annual Income: **$12,852.00**

Income Verification

Verification Source: **Not Verified**

Verification Date: **11/06/2017**

Click [Edit] and update the applicable fields

Income » Seb., C. - Head of Household
Source of Income: **Social Security/Pensions**

Member Information

Member Name: **Seb., C.**

Relation: **Head of Household**

Income Source & Amount

Source of Income: Social Security/Pensions ▼ ⬅

Annual Income: $12,852.00 | Calculate | ⬅

Income Verification

Verification Source: Not Verified ▼ ⬅

Verification Date: 11/06/2017 📅 ⬅

Click 💾 Save

Income » Seb., C. - Head of Household
Source of Income: **Social Security/Pensions** | Edit | Close |

Member Information

Member Name: **Seb., C.**

Relation: **Head of Household**

Income Source & Amount
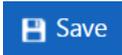
Source of Income: **Social Security/Pensions**

Annual Income: **$12,852.00**

Income Verification

Verification Source: **Not Verified**

Verification Date: **11/06/2017**

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Save & New

New Income
Adding a new income to the system.

Member Information

*Member Name: ▼

Relation:

Income Source & Amount

Source of Income: ▼

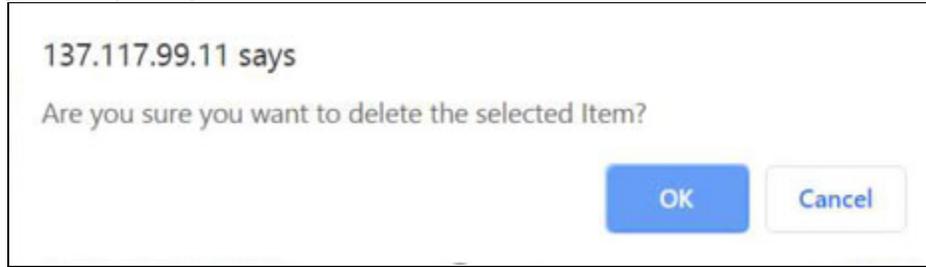Annual Income: | Calculate |

Income Verification

Verification Source: ▼

Verification Date: 📅

Delete Tenant Certs

If a date of certification, move in or transfer was entered incorrectly, click Delete Tenant Certs to remove the incorrect entry. Only the entry with ✖ can be deleted. When more than one entry has a ✖ delete must be **completed starting from top entry.**

> **137.117.99.11 says**
>
> Are you sure you want to delete the selected Item?
>
> [OK] [Cancel]

Save & Close

- General Information
- Household Members
- **Income**
- Assets
- Unit Rent

Unit: 10, Tenant: Seb., C. » Income

Bed	Sq Ft	System Designation	Report Period	Last Report Ending	Building	Project
2	843	Market Rate	01/01/2018 - 12/31/2018	12/31/2017	IA-00-18001	00-18 - WINTER SOLSTICE

[New Income] [Close]

	Member Name	Source of Income	Verification	Annual Income
☐	Seb., C. Head of Household	Social Security/Pensions	11/06/2017 - Not Verified	$12,852.00
☐	Seb., C. Head of Household	Social Security/Pensions	11/06/2017 - Not Verified	$3,987.96

Annual Income: **$16,839.96**

Annual Asset Income: **$19.46**   Total Annual Household Income: **$16,859.42**

***Repeat income and asset edits and/or additional sources until complete

*** **Tenant Certification Form** - MHDC **does not** accept the CP system generated form.

- **General Information**
- Household Members
- Income
- Assets
- Unit Rent

Unit: 10, Tenant: Seb., C. » General Information

Bed	Sq Ft	System Designation	Report Period	Last Report Ending	Building	Project
2	843	Market Rate	01/01/2018 - 12/31/2018	12/31/2017	IA-00-18001	00-18 - WINTER SOLSTICE

[Edit] [Close] [Tenant Certification Form] [Income & Rent Test]

Head of Household Information

Member Name: **Seb., C.**   Social Security Number: **111-11-1111**

Birth Date: **05/26/1952**   Age: **66**   Occupation: **Other, Not Full Time Student**

Sex: **Female**   Marital Status: **Divorced**

Ethnicity: **Not Available**   Race: **White**

Special Population: Disabled: ___

Contact Information

Home Phone: **(000) 000-0000**   Work Phone: **(712) 331-1884**
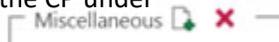
Email:

Transfer Information

Transferred From Building: **IA-00-18001**

Old Unit ID: **09**   Old Unit Move-In: **12/01/2018**

[Templates]

The required MHDC Tenant Certification Form is located on MHDC's website and within the CP under

☐ Miscellaneous ✚ ✖ —

Document Templates

Miscellaneous

Showing 1 - 2 of 2 records

	Template Name	Original Template Name	Uploaded By	Uploaded On
	Owner Cert	a. 2018 Owner Certification.docx	Admin IFA	07/12/2019
	Exhibit E - Utility Allowance	g. Exhibit E -Utility Information Form.docx	Admin IFA	07/12/2019

Income & Rent Test

It is highly recommended the user view the Income & Rent Test. It will identify if the system determines Over Income and/or Over Rent based on Certification date and Effective Income and Rent dates.

Unit ID: 10 » Household Income & Rent Limit Status

Project: **00-18 - WINTER SOLSTICE** | Building: **IA-00-18001**   Close

Household Information

Unit ID: **10**

Head of Household: **Seb., C.**

Family Size: **1**

No. of Bedrooms: **2**

Household Income: **$16,859.42**

Gross Rent: **$550.00**

	Effective as of	Maximum Amount	Status
Income Limits		$0.00	Below Income Limit
Rent Limits	04/01/2018	$0.00	Over Rent Limit

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Click **▶ Household Members** if there have been any changes to the members, i.e. member (other than HOH) moved out during the year.

Unit: 10, Tenant: Seb., C. » Household Members

- ▶ General Information
- ▶ **Household Members**
- ▶ Income
- ▶ Assets
- ▶ Unit Rent

Bed **2** | Sq Ft **843** | System Designation **Market Rate** | Report Period **01/01/2018 - 12/31/2018** | Last Report Ending **12/31/2017** | Building **IA-00-18001** | Project **00-18 - WINTER SOLSTICE**

New Member   Close

Member Name	SSN	Birth Date	Age	Occupation
There are no household members to show in this view.				

Family Size: **1**   Full-Time Students: **0**

Minors: **0**

Upon reviewing all data entered in the system and the user determines an incorrect entry has been entered, other than the Move In Date, select **Edit**

Unit: 10, Tenant: Seb., C. » General Information

- ▶ **General Information**
- ▶ Household Members
- ▶ Income
- ▶ Assets
- ▶ Unit Rent

Bed **2** | Sq Ft **843** | System Designation **Market Rate** | Report Period **01/01/2018 - 12/31/2018** | Last Report Ending **12/31/2017** | Building **IA-00-18001** | Project **00-18 - WINTER SOLSTICE**

Edit   Close   Tenant Certification Form   Income & Rent Test

Head of Household Information

Member Name: **Seb., C.**   Social Security Number: **111-11-1111**

Birth Date: **05/26/1952**   Age: **66**   Occupation: **Other, Not Full Time Student**

Sex: **Female**   Marital Status: **Divorced**

Ethnicity: **Not Available**   Race: **White**

Special Population: Disabled: __

Edit any correctible field identified below and **Save** or **Save & Close**

Unit: 09, Tenant: Test » General Information

Bed	Sq Ft	System Designation	Report Period	Last Report Ending	Building	Project
2	843	Low Income	01/01/2018 - 12/31/2018	12/31/2017	IA-00-18001	00-18 - WINTER SOLSTICE

Head of Household Information

*Member Name: Test   Social Security Number: 111-11-1111

*Birth Date: 01/01/1950   Age: 68   Occupation: Other, Not Full Time Student

Sex: Female   Marital Status: Married

Ethnicity: Race:

Special Population: Disabled:

Household Data

Move-In Date: **12/22/2018**   Household Annual Income: **$0.00**   *Unit Assistance Type: No Assistance

Last Cert Date: **12/28/2018**   Non Qualified Students: Owner's Designation: LIHTC

Save   **Save & Close**   Cancel

Delete Tenant Certs

If a date of certification, move in or transfer was entered incorrectly, click Delete Tenant Certs to remove the incorrect entry. Only the entry with ✖ can be deleted. When more than one entry has an ✖ delete must be completed starting from top entry.

137.117.99.11 says

Are you sure you want to delete the selected Item?

OK   Cancel
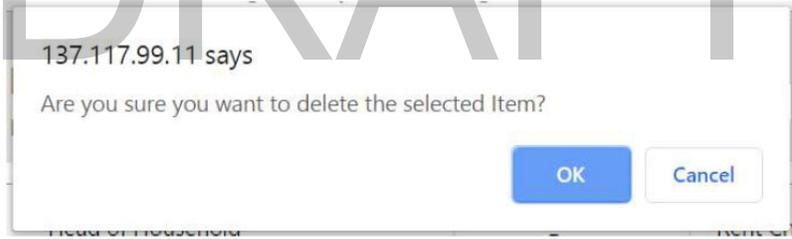
End of Section 4

SECTION 5

MANUAL
UNIT TRANSFER

1. **Within Same Building (If only one building or 8609 election, when project has multiple buildings and owner elected to treat buildings as single buildings)**

    2. **Between Buildings (Multiple Building Project 8609 Election Only)**

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

TRANSFER WITHIN SAME BUILDING

Select the project and click Proceed to Buildings

Select the building and click Proceed to Units

Select the unit that is transferring OUT and click Unit Transfer

Unit ID: 15 » Unit Transfer

Project: **00-18 - WINTER SOLSTICE** | Building: **IA-00-18001**

Unit Transfer Data

Current Unit:	**15**
Current Building:	**IA-00-18001**
*New Unit:	[dropdown] ⬅
*Transfer Effective Date:	[ ] 📅
Tenant Paid Rent:	[ ]
Mandatory Charges:	[ ]
Rental Subsidy:	[ ]
Utility Allowance:	[ ]
Gross Rent:	$0.00

Maximum Section 42 Rent:	$0.00
Maximum HOME Rent:	$697.00

[Transfer] [Cancel]

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Click the down arrow in [*New Unit: ▾] **to show available units** [16 ▾] **and select the unit to transfer to. Once selected, complete all fields**

*Transfer Effective Date:	[ ] 📅 ⬅
Tenant Paid Rent:	[ ] ⬅
Mandatory Charges:	[ ] ⬅
Rental Subsidy:	[ ] ⬅
Utility Allowance:	[ ] ⬅

then click [Transfer] **at the bottom of the page.**

TRANSFER BETWEEN BUILDINGS– Based on 8609 election when allowable.

Select the project and click on [Proceed to Buildings]

emphasys Certification Portal | Your Entity Name | 🏠 Projects | Templates | On-Site Managers | ⚙ ❓ 👤 Admin IFA

Projects
Showing 1 - 300 of 590 records

[Import All Building Data] [Upload Files] [Annual Owner Certification] ⋮ [Proceed to Buildings] [▼]

	Project ID	Project Name	Annual Owner Certification Status	Last Submission Date	Buildings	Contact Us
🔍	00-18	WINTER SOLSTICE 754 Icicle Way, SPIRIT LAKE, IA 513600000	Not Submitted	01/19/2018	2	@

Select the building and click [Proceed to Units]

Project: 00-18 - WINTER SOLSTICE » Buildings
Address: **754 Icicle Way, SPIRIT LAKE, IA 51360-0000**

[Import Building Data] [View Details] [Change Report Period] [Submit Tenant Certs] [Proceed to Units] [Reports] [Close]

	Building ID	Placed In Service Date	Last Report Date	Current Reporting Period	IRS Compliance Status	HOME Compliance Status	Agency Compliance Status	Tenant Recert Status	Last Submission Date	Units
Q	IA-00-18001	12/19/2001	12/31/2017	01/01/2018 - 12/31/2018	In Compliance	In Compliance	In Compliance	Ready		12
Q	IA-00-18002	12/19/2001	12/31/2017	01/01/2018 - 12/31/2018	In Compliance	In Compliance	In Compliance	Ready		8

Select the unit that is transferring OUT and click [Unit Transfer]

Building ID: IA-00-18001 » Units
Project: **00-18 - WINTER SOLSTICE**

[New Unit] [Unit Definition] [Income & Rent Test] [New Tenant Cert] [Delete Tenant Certs] [Move Out] [Unit Transfer] [Ready All Units] [Close]

	Unit ID	No. of Bedrooms	Square Footage	Status	Head of Household	SSN	Last Certification Date	Re-Certification Due Date	Ready Subm
Q	09	2	843	Occupied by Tenant	Test	111-11-1111	12/23/2018		—
Q	10	2	843	Occupied by Tenant	Seb., C.	111-11-1111	12/27/2018		—
Q	11	2	843	Occupied by Tenant	Ka, J.	111-11-1111	06/01/2018		—
Q	12	2	843	Occupied by Tenant	Ji, J.	111-11-1111	12/01/2017	12/01/2018	—
Q	13	2	843	Occupied by Tenant	Mu, D.	111-11-1111	12/01/2017	12/01/2018	—
Q	14	2	843	Occupied by Tenant	Gol, D.	111-11-1111	12/01/2017	12/01/2018	—
Q	15	2	843	Occupied by Tenant	La, P.	111-11-1111	12/01/2017	12/01/2018	—
	16	2	843	Vacant					✔

Unit ID: 10 » Unit Transfer
Project: **00-18 - WINTER SOLSTICE** | Building: **IA-00-18001**

Unit Transfer Data

Current Unit:	**10**
Current Building:	**IA-00-18001**
*New Unit:	▼
*Transfer Effective Date:	
Tenant Paid Rent:	$500.00
Mandatory Charges:	$0.00
Rental Subsidy:	$0.00
Utility Allowance:	$50
Gross Rent:	$550.00

Maximum Section 42 Rent:	$0.00
Maximum HOME Rent:	$697.00

[Transfer] [Cancel]

If the owner elected single buildings on the 8609, only the one building will be visible.

Current Building: **IA-00-18001**

If the owner elected part of a multiple building, all buildings in the project will be in the drop down.

Click the down arrow in [*New Unit: ▼] **to show available units** [16 ▼] **and select the unit to transfer to. Once selected, complete all fields**

*Transfer Effective Date: [____] 🗓 ⬅

Tenant Paid Rent: [____] ⬅

Mandatory Charges: [____] ⬅

Rental Subsidy: [____] ⬅

Utility Allowance: [____] ⬅

then click [Transfer] **at the bottom of the page.**

END OF SECTION 5

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SECTION 6

**MANUAL
MOVE OUT**

DRAFT

Select the project and click Proceed to Buildings

Select the building and click Proceed to Units

Select the unit and click Move Out

Enter *Move Out Date: [ ] **then** click Move Out **at the bottom of the page.**

Unit ID: 10 » Unit Move Out
Project: **00-18 - WINTER SOLSTICE** | Building: **IA-00-18001**

Building ID: **IA-00-18001**

Unit ID: **10**

Head of Household: **Seb., C.**

*Move Out Date: [ ]

Move Out   Cancel

SECTION 7

3RD PARTY SOFTWARE
TENANT DATA IMPORT

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

DRAFT

UPLOADING ALL BUILDING XML FILE

If the 3rd party software (i.e. Yardi, RealPage, etc) creates an XML file that includes **all buildings** in the project, highlight the project and click **Import All Building Data**
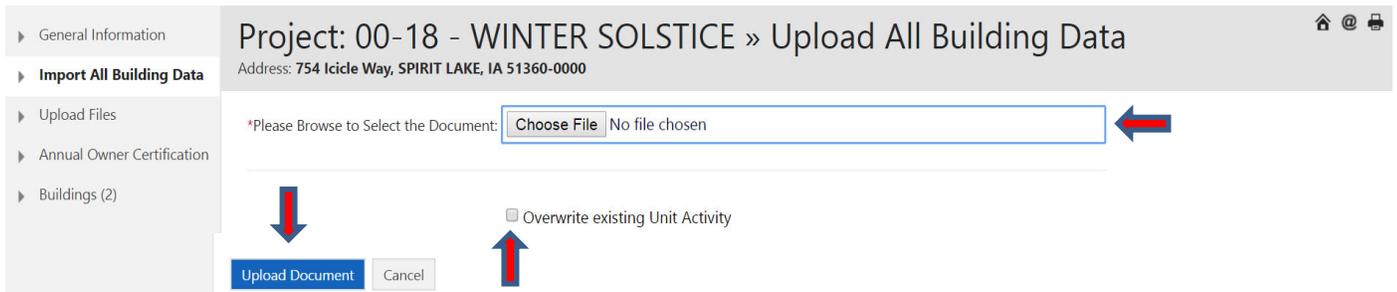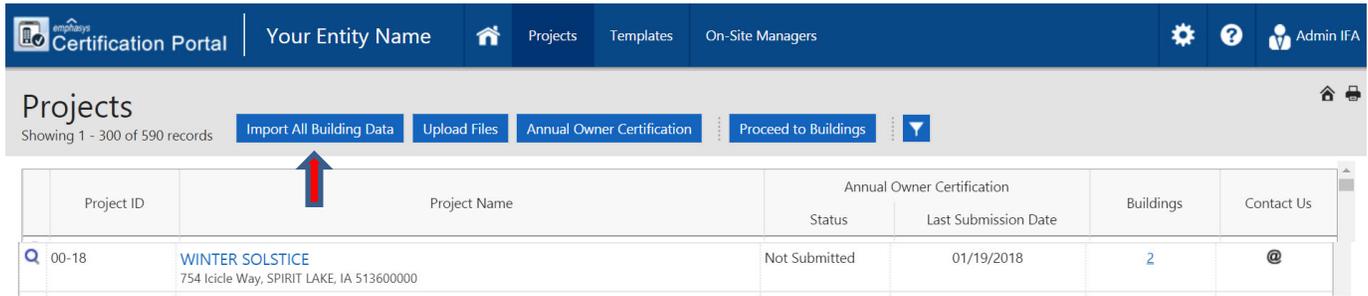
Click on Choose File

Select the XML file created by the 3rd party software (typically found on the C: drive)
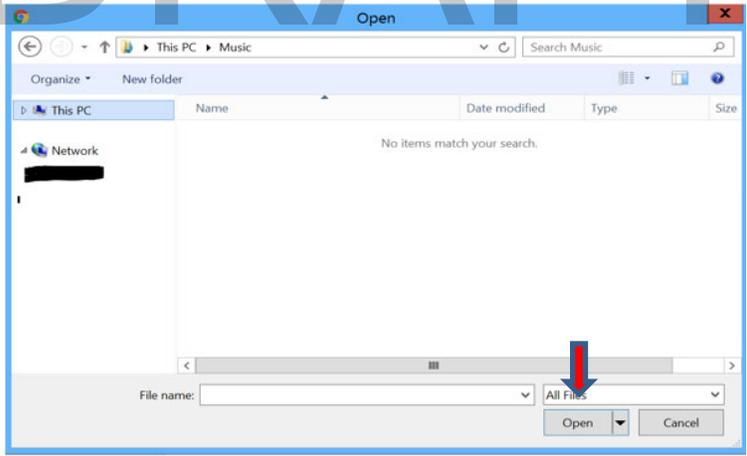
Select the XML file, click Open and click Upload Document to complete the process.
Documents can be uploaded multiple times for the same project as needed, due to errors. After the initial upload, any subsequent uploads, you must check the box ☐ Overwrite existing Unit Activity

NOTE: If user is unable to locate file on the computer, do a search for .xml and it should show up.

UPLOADING SINGLE BUILDING(S) – Even when multiple building in the project.

If the third-party vender makes a separate XML file for each building in the project, you will need to go to the Building Screen to upload each of these files.

Highlight the project and click **Proceed to Buildings**

Select the building that matches the XML file and click **Import Building Data**

Click on **Choose File No file chosen**

*Please Browse to Select the Document: **Choose File** No file chosen

Select the XML file and click **Open** and then click **Upload Document** at the bottom of the CP screen to complete the process. This must be done for all buildings.
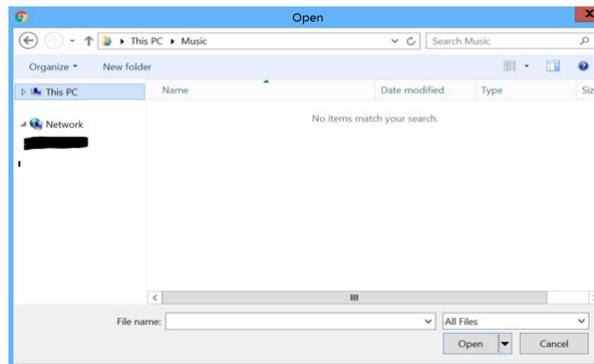
Continue this process until all buildings have been uploaded.
NOTE: If user is unable to locate file on the computer, do a search for .xml and it should show up.

Building ID: IA-00-18001 » Units
Project: **00-18 - WINTER SOLSTICE**

| New Unit | Unit Definition | Income & Rent Test | New Tenant Cert | Delete Tenant Certs | Move Out | Unit Transfer | Ready All Units | Close |
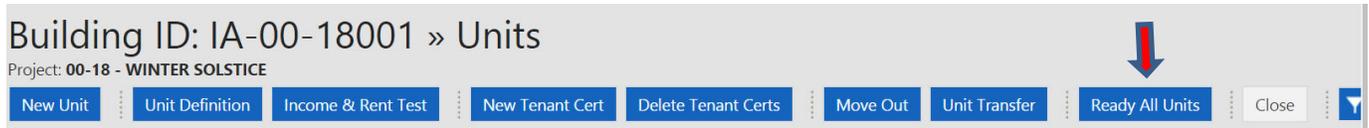
Go back to **Proceed to Buildings** and click **Proceed to Units** and click on **Ready All Units** for each building.

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

If you upload incorrect BIN or Project xml file that does not belong to the selected project, this message will appear:

Invalid File - Process Aborted!
Found transaction record(s) for an existing Project
different than Project currently selected.

OK
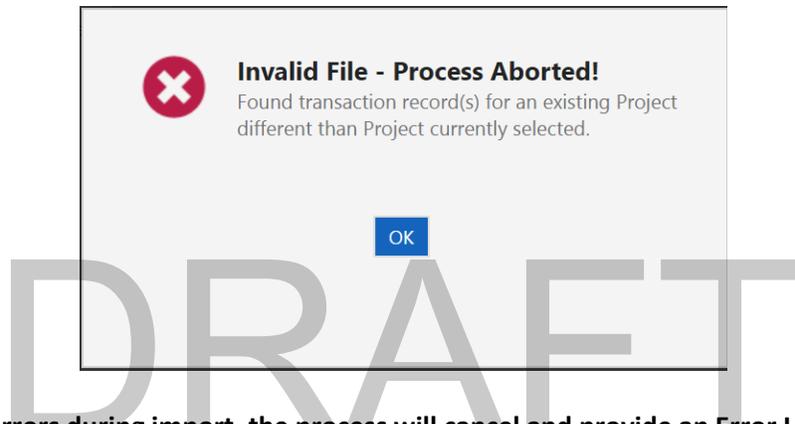
When an XML file has errors during import, the process will cancel and provide an Error Log, see below. If you receive errors, provide a copy of the Error Log and XML file via e-mail to the CP MHDC Compliance Officer for review, correction and re-uploading.

Locate the correct xml file to upload or select Cancel **and program will return to the Building screen.**

END OF SECTION 7

SECTION 8

**Download and Upload Forms
And
Annual and Inspection Documents**

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UPLOADING FILE DOCUMENTS (NOTE: This is different from the Upload Document above)

Click on [Projects] **to access Projects list. Select the project and click** [Upload Files]

Scroll to the bottom [Miscellaneous icons]

Click on [NEW icon] **NEW icon to search for the file(s) for uploading:**

Document Type will always be Miscellaneous

Name Document Title XXXX Annual Report or Annual Report Response or XXXX Inspection Documents, XXXX Inspection Tenant Files, Inspection Response

Document Upload

*Select File: [Choose File] No file chosen
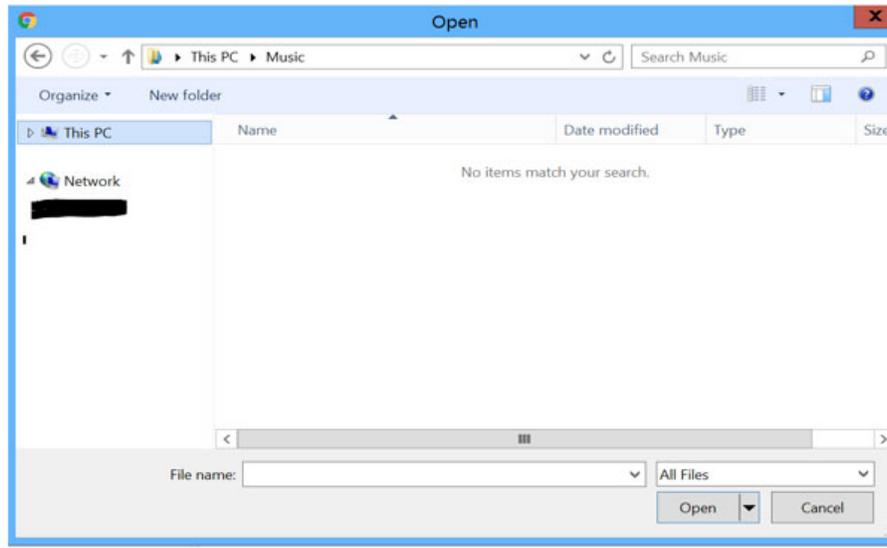
Select File: It is best to zip the documents and upload as one file (i.e. not individual files for each unit).
NOTE: If user is unable to locate file on the computer, do a search for .xml and it should show up.

Select how to proceed by using the buttons below. Buttons are at the bottom of the screen (screen must be maximized to access these).

[💾 Save] [Save & New] [Save & Close] [Cancel]

If only uploading one set of files, click [Save & Close]**, if uploading more than one set of files, click** [Save & New]

until all files have been uploaded and then [Save & Close]**.**

END OF SECTION 8

SECTION 9
ANNUAL OWNER CERTIFICATION

DRAFT

Annual Owner Certification

(The Agency does not review the CP system generated document. The system requires it to be submitted in order to submit the building(s). The Agency provides a different document annually via e-mail, MHDC website and within CP system.

Project: 00-18 - WINTER SOLSTICE » General Information

Address	Owner	Last Certification Ending	Type of Certification
754 Icicle Way, SPIRIT LAKE, IA 51360-0000		12/31/2017	Certification

- General Information
- Import All Building Data
- Upload Files
- **Annual Owner Certification**
- Buildings (2)

*New Certification Period: [   ] - [   ]

○ No Buildings have been Placed in Service
○ At least one building has been Placed in Service but owner elects to begin credit period in the following year
◉ None of the above applies

The Undersigned: [   ]

On Behalf of: [   ]

1. The project meets the minimum requirements of: (check one)
◉ 20-50 test under Section 42(g)(1)(A) of the Code
○ 40-60 test under Section 42(g)(1)(B) of the Code (25-60 NY Only)
○ 15-40 test for "deep rent-skewed" projects under Section 42(g)(4) and 142 (d)(4)(B) of the Code

2. There has been no change in the applicable fraction (as defined in Section 42(c)(1)(B) of the Code) for any building in the project:
◉ No Change ○ Change

[Save] [Save & Close] [Submit Certification] [Cancel] [Annual Owner Certification Form]

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END OF SECTION 9

SECTION 10

REVIEWING DATA AND SUBMITTING TO AGENCY

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REVIEWING UNIT DATA AND READYING UNITS FOR SUBMISSION.

Reports

Building ID: IA-00-01002 » Reports
Project: **00-01 - Meadow Crest Gardens I**   Close

- General Information
- Import Building Data
- Change Report Period
- Units
- **Reports**

📊 **LIHTC/HOME Annual Occupancy**
☐ Include units without recent activity   ☐ Show only last 4 digits of SSN in reports
☐ Run Report for all Buildings

📊 **Household Income & Rent Limits Status**

These reports can also be downloaded to Word or Excel.

📊 **LIHTC/HOME Annual Occupancy**
☑ Include units without recent activity   ☑ Show only last 4 digits of SSN in reports
☐ Run Report for all Buildings

Detail Report

STUDENT EXPLANATION
1 - TNAF assistance.
2 - Job Training Program.
3 - Single parent/dependent child.
4 - Married/joint return.
5 - Previous Foster Care.
6 - Extended-Use Period.

Your Entity Name   Generated on 7/23/2019 by Admin IFA   Page 1 of 1
LIHTC/HOME Annual Occupancy Report

Unit ID	Unit Sq Ft	BR	Move-In Date	Move-Out Date	Head of Household SSN	Head of Household Name	Effective Date/Last Certification Date	Rent Change Date	Initial Cert Y/N	Age Head of Hshld	Gross Annual Income at Recert	Monthly Tenant Paid Rent	RHS Rent Overage	Mandatory Charges	Amount of Rental Subsidy	Util Allow	# in Hshld at Recrt	Non-qual Stdnt Y/N	Qual Stdnt Expln Code	Mrkt Unit Y/N

Project: 00-18 WINTER SOLSTICE, Project Address: 754 Icicle Way

Building: IA-00-18001, Total Number of Units: 12

Unit ID	Unit Sq Ft	BR	Move-In Date	Move-Out Date	Head of Household SSN	Head of Household Name	Effective Date/Last Certification Date	Rent Change Date	Initial Cert Y/N	Age	Gross Annual Income	Monthly Tenant Paid Rent	RHS Rent Overage	Mandatory Charges	Amount of Rental Subsidy	Util Allow	# in Hshld	Non-qual Stdnt	Qual Stdnt Expln	Mrkt Unit
09	843	2	08/01/2011	10/10/2018	###-##-1111	Rees, Nancy	12/01/2017		N	70	$11,370.96						1	N		N
09	843	2	12/01/2018	11/01/2008	###-##-1111	Sebastian, Connie	12/01/2017		N	65	$16,859.42	$500.00		$0.00	$0.00	$50.00	1	N		N
09	843	2	12/01/2018	12/10/2018	###-##-1111	Sebastian, Connie	12/02/2018		N	66	$16,859.42	$500.00	$0.00	$0.00	$0.00	$50.00	1	N		N
10	843	2	07/12/2013	12/01/2018	###-##-1111	Sebastian, Connie	12/01/2017		N	65	$16,859.42						1	N		N
10	843	2	12/10/2018		###-##-1111	Sebastian, Connie	12/02/2018		N	66	$16,859.42	$500.00	$0.00	$0.00	$0.00	$50.00	1	N		N
11	843	2	06/01/2017		###-##-1111	Kain, Janice	12/01/2017		N	73	$19,622.48						1	N		N
12	843	2	10/01/2014		###-##-1111	Jimenez, John	12/01/2017		N	85	$16,624.31						1	N		N

Page 1 of 1

📊 **Household Income & Rent Limits Status**

Detail Report

Your Entity Name   Generated on 7/23/2019 by Admin IFA   Page 1 of 1
Household Income & Rent Limits Status Report

Unit ID	Bed Size	Head of Household Full Name	Household Size	Move-In Date	Last Certification Date	Last Rent Change Date	Total Annual Household Income	Income Limit	Effective Date	Income Limit Status	Monthly Gross Rent	Rent Limit	Effective Date	Rent Limit Status

Project: 00-18 WINTER SOLSTICE, Project Address: 754 Icicle Way

Building: IA-00-18001, County: Dickinson

Unit ID	Bed Size	Head of Household Full Name	Household Size	Move-In Date	Last Certification Date	Last Rent Change Date	Total Annual Household Income	Income Limit	Income Limit Status	Monthly Gross Rent	Rent Limit	Effective Date	Rent Limit Status
09	2	Rees, Nancy	1	08/01/2011	12/01/2017		$11,370.96	$0	Below Income Limit	$0.00	$0	04/14/2017	Below Rent Limit
09	2	Sebastian, Connie	1	12/01/2018	12/01/2017		$16,859.42	$0	Below Income Limit	$0.00	$0	04/14/2017	Below Rent Limit
09	2	Sebastian, Connie	1	12/01/2018	12/02/2018		$16,859.42	$0	Below Income Limit	$550.00	$0	04/01/2018	Over Rent Limit
10	2	Sebastian, Connie	1	07/12/2013	12/01/2017		$16,859.42	$0	Below Income Limit	$0.00	$0	04/14/2017	Below Rent Limit
10	2	Sebastian, Connie	1	12/10/2018	12/02/2018		$16,859.42	$0	Below Income Limit	$550.00	$0	04/01/2018	Over Rent Limit
11	2	Kain, Janice	1	06/01/2017	12/01/2017		$19,622.48	$0	Below Income Limit	$0.00	$0	04/14/2017	Below Rent Limit
12	2	Jimenez, John	1	10/01/2014	12/01/2017		$16,624.31	$0	Below Income Limit	$0.00	$0	04/14/2017	Below Rent Limit

There are 2 ways to make a unit Ready to Submit.

Building ID: IA-00-18001 » Units
Project: **00-18 - WINTER SOLSTICE**

General Information
Import Building Data
Change Report Period

| New Unit | Unit Definition | Income & Rent Test | New Tenant Cert | Delete Tenant Certs | Move Out | Unit Transfer | Ready All Units | Close |

At the BUILDING Level Screen:

Click [Ready All Units] This allows the building to be submitted to the agency. This method will always occur with 3rd party uploads. Manual entries can also use this process by waiting until they have entered all unit data for the building(s)

To manually check the [Ready to Submit: ☐] **you will need to go into each unit and check the box or check the box while you are entering data for the unit.**

END OF SECTION 10

SECTION 11

MANAGEMENT CONTROLS
(SUPER USER)

DRAFT

On-Site Managers

Manage On-Site Managers

On-Site Managers
Showing 0 - 0 of 0 records   New | Reset Password | Unlock Projects | ▼

Full Name	Login Name	Email	Financial Manager Only
There are no on-site managers to show in this view.			

New

New On-Site Manager
Adding a new on-site manager to the system.

USER NAME MUST BE AT LEAST SIX CHARACTERS AND PASSWORD MUST BE AT LEAST SIX CHARACTERS AND INCLUDE – Capital letter, Symbol (!,* $, etc) and one number.

General Information
- *First Name:
- Middle Name:
- *Last Name:
- *Email:
- Financial Manager Only: ☐

Login Information
- *User Name:
- *Password:

💾 Save | Save & New | Save & Close | Cancel

Reset Password

On-Site Manager » Test Tested
Existing on-site manager configuration.   Edit | Close | Reset Password | Unlock Projects

This site says...   ×

Are you sure you want to reset this on-site manager's password?

☐ Don't let this page create more messages

| OK | Cancel |

✔ **Successful Reset**

The password for this on-site manager has been successfully reset.

Unlock Projects

This site says...   ×

Are you sure you want to unlock all projects for this on-site manager?

☐ Don't let this page create more messages

| OK | Cancel |

✔ **Successful Reset**

The password for this on-site manager has been successfully reset.

Project Assignment

On-Site Manager Project Assignment   🏠 🖨

Select On-Site Manager For Project Assignment

[▼]

Project Assignment

Showing 0 - 0 of 0 records

Project ID	Project Name	Assigned On-Site Managers
	There are no projects to show in this view.	

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

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