CERTIFICATION PORTAL (CP)



Formally known as: Certification Online (COL)

A HOW-TO GUIDE FOR ANNUAL REPORTING

JULY 2020

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LEGEND

ń	Return to the Landing Page (Snapshot)
	Search or Sort
ত	Linde 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
	Export to Excel
	Export to Word
P	Submit to MHDC
×	Delete Record

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.	emphasys Certification Portal Version: 7.0
	System Login This screen allows you to log into the system.
	*User Name: *Password: Remember me on this computer Login
COMPLIANCE	 > Forgot your user name? > Forgot your password?
New Super and Non-Super User This screen will then appear and require the user to NOTE: The username and password fields require a	create a new User ID and Password. at least 6 characters and are case sensitive.
Certification Portal	Iowa Finance Authority
Change Your User N Before you continue you are required to char	Jame & Password
Please enter your current and new user n	ames below.
*Current Login Name:	
*New Login Name:	
 Please enter your current and new passw 	ords below.
*Current Password:	
*New Password:	
*Confirm Password:	

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

Certification Portal Your Entity Name A Projects Templates On-Site Managers	🌞 🕜 🔥 Admin 177
Snapshot	ô =
Projects Status & Search	Annual Owner Certifications Submission Status
Project ID:	Pior Submitted Trian Submitted Trian Submitted Trian Submitted Trian Submitted Trian Submitted
Recently Viewed Projects	
Q 00-01 Meadow Crest Gardens I 12.8uklings Q 00-18 WINTER SOLSTICE 2.8uklings Q 00-03 GRAY HARES APTS 1.8uklings Q 00-03 GRAY HARES APTS 1.8uklings	
V/-42 mily naven <u>3 bolionitys</u>	

EXISTING (COL) User



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

Submit



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End of Section 1

ACCESSING PROJECTS



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

Certification Portal	Your Entity Name	n Pr	rojects	Templates	On-Site Managers	•	?	Admin IFA
Snapshot								ô 🖶
Projects Status & Search					Annual Owner Certifications Submission Status			<u> </u>
Projects Status ✓ 590 Projects View All	Project ID Project Name Grantee Number IDIS Activity Number	t: E: C: Search			9 Not Submitted 577 Not Submitted 4 Submitted			
Recently Viewed Projects								
Q 00-18 WINTER SOLSTICE Q 07-42 Hilly Haven Q 00-03 GRAY HARES APTS	2 Buildings 9 Buildings 1 Building							



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

	emphasys Certification	Portal Your Entity Name	e 🖍	Projects	Templates	On-Site I	Managers				0	🔂 Admir	n IFA
P	rojects owing 1 - 300 of 590	records Import All Building Data	Upload File	s Annual Ov	vner Certificatio	n Pro	ceed to Buildings	1				â	-
	Project ID Project Name						Annual Status	Owner Certification Last Submission Date	Build	ings	C	ontact Us	
Q	00-03	GRAY HARES APTS Not Submi 153 Crooked Lane, DUBUQUE, IA 520010000		Not Submitted	01/19/2018	1							
Q	00-18	WINTER SOLSTICE 754 Icicle Way, SPIRIT LAKE, IA 513600000					Not Submitted	01/19/2018	4	2		@	

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.

on Date Buildings Contact Us						
on Date Buildings Contact Us		ID: 00-18 × Clear All	Results for: Project ID			
018 2 @	Annual Owner Certification Status Last Submission Date	Project ID Project Name				
	Not Submitted 01/19/2018	WINTER SOLSTICE 754 lcide Way, SPIRIT LAKE, IA 513600000	Q 00-18			
ntly Viewed Projects	Not Submitted 01/19/2018 Recently View	WINTER SOLSTICE 754 Icicle Way, SPIRIT LAKE, IA 513600000	Q 00-18			

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

Certification Porta	I Your Entity Name 🕋	Projects Templates On-Si	te Managers		* 0	Admin IFA
General Information Import All Building Data	Project: 00-18 - W Address: 754 Icicle Way, SPIRIT LAKE, IA	INTER SOLSTICE »	General Informatio	ON Close		ô @ 6
Upload FilesAnnual Owner Certification	Oc	ps! Something went v	vrong.			•
Buildings (2)			- 1			
	754 Icicle Way , IA 51360-0000		4	e,		_
	Electronic Documents	Annual Owner Cert	Buildings			- 1
			Ħ			- 1
	0	Not Submitted	2			Ŧ

Option 5: Click on	Projects		Ļ					
Certification Portal	Your Entity Name	ñ	Projects	Templates	On-Site Managers	٠	0	Admin IFA

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

Certification Porta	I Your Entity Name	ń	Projects	Templates	On-Site Managers				\$ 0	🔬 Admin I
Projects Showing 1 - 1 of 1 records	mport All Building Data Upload t	Files /	unnual Owner	Certification	Proceed to Buildings					â
Project ID				Pro	ect Name	Annu Status	ual Owner Certification Last Submission Date	Buildings	Co	ntact Us
Q 00-18	WINTER SOLSTICE 754 Icicle Way, SPIRIT LAKE IA 51	3600000				Not Submitted	01/19/2018	2		@

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End of Section 2

MANUAL ENTRY NEW MOVE IN



Select the project the user will be working in. Click

Proceed to Buildings

	Certification Portal	Your Entity Name	ñ	Projects	Templates	On-Site Managers				8	Admin IF/
P	rojects owing 1 - 1 of 1 records	ort All Building Data Upload File	es A	nnual Owner (Certification	Proceed to Buildings					8 6
Q	Results for: Project ID: 00-18 🗙	6 Clear All				1					
	Broject ID				Droi	ort Namo	Ann	ual Owner Certification	Ruildinge	Cont	act Lic
Project ID					Proj	ectivalite	Status	Last Submission Date	buildings	cont	accos
C	00-18	WINTER SOLSTICE 754 Icicle Way, SPIRIT LAKE, IA 5136	00000				Not Submitted	01/19/2018	2	(0

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

General Information	Project: 00-18 - WINTER SOLSTICE » Buildings							â) @ 🖶		
Import All Building Data	Addr	Idress: 734 Icicle Way, SPIKIT LAKE, IA 51360-0000									
Upload Files	Upload Files										
Annual Owner Certification			Placed In	Last Report	Current Reporting	IRS Compliance	HOME	Agency	Tenant Recert	Last	
Buildings (2)		Building ID	Service Date	Date	Period	Status	Compliance Status	Compliance Status	Status	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

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

General InformationImport Building Data	Building ID: IA-00-18001 » Change Report Period	ô @ 8
Change Report Period	*New Reporting Period: 11/01/2018 📰 - 12/31/2018 📰	
 Units 		
Reports	Cancel	
To update the r	reporting year for all buildings in the project, check the box Update All Buildings and click	Bave
Click on Units	in the menu on left side of screen.	
General Information	n	
Import Building Da	ta	
Change Report Per	iod	
Units		
 Reports 		
Select the unit	the user will be working in and click New Tenant Cert	
Puilding ID	14 00 19001 Unite	^ @ 🖶

Bu Proje	Building ID: IA-00-18001 » Units Project: 00-18 - WINTER SOLSTICE										
Ne	w Unit	Unit Definition	Income & Rent	Test New Tenant	Cert Delete Tenant Certs Mov	ve Out Unit Transf	er Ready All U	nits Close	T		
	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					✓	1	
Q	10	2	843	Occupied by Tenant	Seb., C.	111-11-1111	12/15/2018		_		
Q	11	2	843	Occupied by Tenant	Ka, J.	111-11-1111	06/01/2018		_]	

You must complete all applicable boxes on this page.

Head of Household Info	rmation ——					
*Member Name:			Social Security Number	:		
*Birth Date:		Age:	Occupation	:		
Sex:			 Marital Status 			
Ethnicity:			▼ Race	:		
Special Population:			▼ Disabled	: 🗆		
Household Data						
*Move-In Date:			Household Annual Income	: *Unit Assi	stance Type:	:
*New Cert Date:			Non Qualified Students	Owner's [Designation:	LIHTC
Initial Certification:			Family Size:		Restriction:	30/50 (HOME - VLI)
Ready to Submit: 🛛						
Contact Information -				Transfer Information		
Home Phone:		Work Pho	one:	Transferred From Building:		
Email:				Old Unit ID:		Old Unit Move-In:

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 <u>are</u> required to be on the application and the household may choose not to answer).

Γ	- Head of Household Inf	formation				-
	*Member Name:		Social Security Number:			
	*Birth Date:	Age:	Occupation:	Υ.	· 🔶	- 11
	Sex:	•	Marital Status:	•	· 🔶	- 11
	Ethnicity:	T	Race:	¥	T	- 11
	Special Population:	¥	Disabled:			

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 Certification 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.

*Move-In Date:	Household Annual Income:	*Unit Assistance Type:		
*New Cert Date:	 Non Qualified Students:	Owner's Designation:	LIHTC	
nitial Certification: ⊻	Family Size:	Restriction:	30/50 (HOME - VLI)	

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

Contact information	
Home Phone:	
Email:	

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 w	vith the page or Save & Close	when ready to move to next unit.	ı.
General Information	·	J J J J J J J J J J J J J J J J J J J	
Household Members			
Household Members			
Income	Household Members		
 Assets 	▶ Income		
Unit Rent	Assets	HOME ONLY projects are not required to enter the herefore these 3 links may not be available.	detail data
f more than one household Idditional members.	hember, click Household I	Members to add all (adults, minors, unborn child,	etc.)
Unit: 10, Tenant: Se Bed Sq Ft System Designation Repo 2 843 Market Rate 01/0 New Member Close	b., C. » Household N rt Period 1/2018 - 12/31/2018 Last Report Ending 12/31/2017	Members Building Project IA-00-18001 00-18 - WINTER SOLSTICE	ô (
Member Name	SSN Birt	th Date Age Occupation	
	There are no househol	ld members to show in this view.	
	Family Size: 1	Full-Time Students: 0	
	Minors: 0		
lick New Member			
New Household Memb	ber		
- 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:	:	
B Save Save & New Save	e & Close Cancel		

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

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

Enter Sex, Marital Status. Ethnicicity, 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 Membe	er (Demographics)				
Se	X:	Marital Status:		• 🛑	
Ethnicity	y:	Race:			
Special Population	n:	▼ Disabled:			
Click Save move to nex	^e when done with the p xt unit.	age or Save & New	to add add	itional members or	ave & Close when ready to
To add all h	ousehold income, click	Income	on the me	nu on the left side of	the screen.
Unit: 09 Bed Sq Ft Sy 2 843 Lo New Income	, Tenant: Test » Inc (stem Designation by Income 01/01/2018 - 12/3 Close	Last Report Ending 1/2018 12/31/2017	Building IA-00-18001	Project 00-18 - WINTER SOLSTICE	송 문

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: \$0.0	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:	
Bave Save & New Save & Close Cancel	

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

Member Information	1			
*Member Name:	Test	•		
Relation:	Head of Household			

Income Source & Amount, 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 & An	nount		
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.

6	Calculate Annual Pay Rate \$0.00 Pav Frequency Apply Cancel	Încome	
		1000	

Income Verification, part of income process includes Verification 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

Ur Bed 2	sq Ft System Designation 843 Market Rate	Seb., C. » Income Report Period 01/01/2018 - 12/31/2018 Last Report 12/31/2018	ort Ending Building Project D17 IA-00-18001 00-18 - WINTER SOLSTICE	8 🖶
	Member Name	Source of Income	Varification	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: \$16,859.4	2
Clic mo	k B Save when do ve to next unit.	ne with the page or Save	& New to add additional incomes or Save & Clos	^e when ready to

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

General Information Household Members Income	Ur ^{Bed} 2	sq Ft 843 System Designation Market Rate	Seb., C. » Assets Report Period Last R 01/01/2018 - 12/31/2018 12/31	eport Ending Building Project /2017 IA-00-18001 00-18 - WINTER SOLSTICE		合 🖶
 Unit Rent 		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: \$16,8 Annual Asset Income: \$ 1	39.96 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.



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



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



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



Rent Change Date:

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

Tenant Paid Rent:

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

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

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

Utility Allowance: This amount reflects what has been provided by the local PHA or an 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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MANUAL ENTRY RECERTIFICATION



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).

Sel	ect the pro	ject and Proceed to Build	lings								
1	Certification	Portal Your Entity Name	ñ	Projects	Templates	On-Site Managers		٠	0	🔂 Admin I	IFA
P	rojects owing 1 - 300 of 590	records Import All Building Data Uplo	ad Files	Annual Ow	vner Certification	Proceed to Buildings				â	+
	Project ID	Pro	ject Nam	e		Annua Status	I Owner Certification Last Submission Date	Buildings	C	ontact Us	
Q	00-18	WINTER SOLSTICE 754 Icicle Way, SPIRIT LAKE, IA 513600000				Not Submitted	01/19/2018	2		@	

Select the building then click Proceed to Units

▶ Ge ▶ Im ▶ Up	neral Information port All Building Da Iload Files	ta Addr	ress: 754 Icicle W port Building Dat	0–18 – WI ^I ay, SPIRIT LAKE, IA S a View Details	NTER 51360-0000 Change Rep	SOLSTICE :	» Buildi t Tenant Certs	ngs	Reports	Close	â) @
AnBu	nual Owner Certific ildings (2)	ation	Building ID	Placed In L Service Date	.ast Report Date	Current Reporting Period	IRS Complia Status	nce HOME Complia Status	Agency Ace Compliance Status	e Tenant Recert Status	Last Submission Date	Units
		Q	IA-00-18001	12/19/2001 1	2/31/2017	01/01/2018 - 12/31/2018	In Compliance	e In Complian	ce In Compliance	Ready		<u>12</u>
		Q	IA-00-18002	12/19/2001 1	2/31/2017	01/01/2018 - 12/31/2018	In Compliance	e In Complian	ce In Compliance	Ready		8
Sele Bu Projec New	Ct the unit	t then cl): A-0 R SOLSTICE Definition	IICK 0-1800 Income & Rent	1 » Units	;	Delete Tenant Certs	Move Ou	ut Unit Transfe	r 🦉 Ready All Ui	nits Close	2	ì @ 🖶
	Unit ID	No. of Bedrooms	Square Footage	Status		Head of Househol	d	SSN	Last Certification Date	Re-Certification Due Date	Ready to Submit	
Q	09	2	843	Occupied by Tena	nt Test			111-11-1111	12/23/2018		_	
Q	10	2	843	Occupied by Tena	nt Seb.,	С.		111-11-1111	12/27/2018		-	
General	Information E	Unit: 1 Bed Sq Ft 843	O, Tenal System Designat Market Rate	nt: Seb., C tion Report Period 01/01/2018 -	C. » Ge	Last Report Ending 12/31/2017	mation Building IA-00-18001	Project 00-18 - WINTER	R SOLSTICE			

*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:	Ŧ	Disabled:		

	Household Data			
	Transfer-In Date: 12/10/2018	V10/2018 Household Annual Income: \$16,859.42 *Unit Assistance Non Qualified Students: Owner's Design		No Assistance 🔻
	*New Cert Date:			LIHTC
	Initial Certification: Ready to Submit: 🔲	Family Size: 1	Restriction:	30/50 (HOME - VLI)
	Contact Information	Transfer Informat	tion	
	Home Phone: 000 - 000 - 000 Wo Email:	rk Phone: 712 - 331 - 1884 Transferred	d From Building: IA-00-18001 Old Unit ID: 09	Old Unit Move-In: 12/01/2018
Enter New Cer	Save & Close Cancel	and click B Save		
Click on memb	Der name then New Income			
 General Information Household Members Income 	Unit: 10, Tenant: Seb., (Bed Sq Ft System Designation 2 843 Market Rate 01/01/2018 New Income Close	C. » Income d Last Report Ending Building - 12/31/2018 12/31/2017 IA-00-18001	Project 00-18 - WINTER SOLSTICE	☆ 🖶
 Assets Unit Rent 	Member Name	Source of Income	Verification	Annual Income
	Seb., C. Social Set Head of Household Social Set Seb., C. Social Set Head of Household Social Set	ecurity/Pensions 11/06/2017 - Not Verified ecurity/Pensions 11/06/2017 - Not Verified	- T	\$12,852.00
	Annu	Annual Income: \$16,839.96 hal Asset Income: \$19.46	Total Annual Household Income:	\$16,859.42
Source of Income: S	» Seb., C Head o Social Security/Pensions	f Household	Close	8
C Member Inform	nation			
Member N	ame: Seb. C .			
Rela	ation: Head of Household			
Income Source	& Amount			
Source of Inco	ome: Social Security/Pensions			
Annual Inco	ome: \$12,852.00			
Income Verifica	ation			
Verification So	urce: Not Verified			
Verification [Date: 11/06/2017			
L				

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
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



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

Page 25

Certification Portal Your Entity Name	ñ	Projects	Templates	On-Site Managers	٠	?	Admin IFA
Document Templates			1				ô 🖶
Miscellaneous 🗅 🗙							

Showing 1 - 2 o	f 2 records			
8	Template Name	Original Template Name	Uploaded By	Uploaded On
Owner Cer	t	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.

Household Information				Effective	Maximum Amount	Status	
Unit ID: 10			ome Limits	as oi	\$0.00	Below Income Limit	- 4
Head of Household: Seb., C.		Per	at Limite	04/01/2018	\$0.00	Over Rent Limit	$-\lambda$
Family Size: 1				04/01/2018	\$0.00		
No. of Bedrooms: 2							
Household Income: \$16,859.42				_			
Gross Rent: \$550.00				_			
k Household Memb	ers if there h	ave been any o	changes to the r	members,	i.e. membe	r (other than H	IOH)
k Household Memb ved out during the year meneral Information Unit: 10	r. , Tenant: Se	b., C. » Hous	changes to the r ehold Memb	members, ers	i.e. membe	r (other than H	IOH)
Household Memb ved out during the year eneral Information Iousehold Members Bed Sq Ft Sy 2 843 M	r. , Tenant: Se arket Rate 01/07	b., C. » Hous	changes to the r ehold Memb t Report Ending 731/2017 IA-00-180	ers	i.e. membe	r (other than H	IOH)
k Household Memb ved out during the year reneral Information Lousehold Members acome New Member	ers if there h r. , Tenant: Se rstem Designation larket Rate 01/0 Close	b., C. » Hous	changes to the r ehold Memb t Report Ending 14-00-180	ers Project 001 00-18 - Wil	i.e. membe	r (other than H	iOH) â
k Household Memb ved out during the year ieneral Information Iousehold Members ncome ssets	ers if there h r. , Tenant: Se stem Designation larket Rate 01/07	b., C. » Hous	changes to the r ehold Memb t Report Ending 731/2017 IA-00-180	ers ^{Project} 001 00-18 - Wil	i.e. membe	r (other than H	iOH)
k Household Memb ved out during the yea seneral Information tousehold Members ncome ussets Jnit Rent	if there h r. , Tenant: Se , stem Designation larket Rate Close	b., C. » Hous trPeriod Las 1/2018 - 12/31/2018 12/ SSN	changes to the n ehold Memb t Report Ending 731/2017 IA-00-180 Birth Date	ers Project 001 00-18 - WIR	i.e. membe	r (other than H	IOH)
Household Memb oved out during the yea General Information Household Members Bed Sq Ft 2 843 M Income Assets Unit Rent	if there h r. , Tenant: Se (stem Designation (arket Rate Close (lember Name	b., C. » Hous htPeriod Las 1/2018 - 12/31/2018 12,	changes to the r ehold Memb t Report Ending 731/2017 IA-00-180 Birth Date	ers Project 001 00-18 - Will	i.e. membe	r (other than H	IOH)
k Household Memb ved out during the yea	if there h r. , Tenant: Se rstem Designation larket Rate Close	b., C. » Hous there any of the second	changes to the r ehold Memb t Report Ending 31/2017 IA-00-180 Birth Date are no household members to	Project Project 001 00-18 - WI Age	i.e. membe	r (other than H	IOH)

Upon reviewing all data entered in the system and the user determines an incorrect entry has been entered, other

Edit

th	an the Move	In Date, select	
•	General Information	Unit: 10, Tenant: Seb., C. » General Information	8
•	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	
•	Income	Edit Close Tenant Certification Form Income & Rent Test	
•	Assets		
•	Unit Rent	Head of Household Information	lî.
		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	
---	--------	----	--------------	--

General Information	Unit: 09, Tenant: Test » G	eneral Information		ô (
Household Members	Bed Sq Ft System Designation Report Period 2 843 Low Income 01/01/2018 - 12/	Last Report Ending Building Pro	oject -18 - WINTER SOLSTICE		
Income					
 Assets 	Head of Household Information			^	ĺ.
Unit Rent	*Member Name: Test	Social Security Number: 111-11-1111			
	*Birth Date: 01/01/1950 Age: 68	Occupation: Other, Not Full	Time Student 🔻		l
	Sex: Female	Marital Status: Married			l
	Ethnicity:	Race:			l
	Special Population:	Disabled:			l
	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: \Box	Owner's Designation:	LIHTC	
	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 completed starting from	entry with K can be delete	d. When more than o	one entry has an	× delete must be
	137.117.99.11 says Are you sure you want to delete the	he selected Item?		
-	, ,	ок	Cancel	

End of Section 4



- 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

Se	elect the	project and click	Procee	ed to Bu	ildings							
	Certification	n Portal Your Entity Name	ñ	Projects	Templates	On-Site Managers			\$	8	🔬 Admin	n IFA
S	Projects Showing 1 - 300 of 59	D records Import All Building Data Up	oad Files	Annual Ov	vner Certification	Proceed to Buildings					â	-
	Project ID	Pr	oject Nam	e		Annual Status	l Owner Certification Last Submission Date	Building	IS	C	ontact Us	
Q	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

 General Information Import All Building Data Upload Files 	Pr Add	ress: 754 Icicle W aport Building Dat	0–18 – V Iay, SPIRIT LAKE, a View Details	VINTER IA 51360-0000 Change Rep	SOLSTICE >	» Building	Dis Units	Reports Close	se 🔽	â	` @
Annual Owner CertificationBuildings (2)		Building ID Placed In Service Date L IA-00-18002 12/19/2001 1		Last Report Date	Current Reporting Period	Agency Compliance Status	Agency Compliance Status				
	Q	IA-00-18001	12/19/2001	12/31/2017	01/01/2018 - 12/31/2018	In Compliance	In Compliance	In Compliance	Ready		<u>12</u>
	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

General Information Import Building Data	Bu Projec	ilding	ID: IA-0 NTER SOLSTICE	0-1800	1 » Units	t Cart Dolato Tanant Carte N		er Pearly All Li	site Close	
Change Report Period	- Nev		The Demnition	income & kent	Test New Tenan	Vent Delete renant certs	one out onit mansi	Ready Air Or		<u> </u>
Units Reports		Unit ID	No. of Bedrooms	Square Footage	Status	Head of Household	SSN	Last Certification Date	Re-Certification Due Date	Ready Subm
reports	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: 15 » Unit Transfer

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

Unit Transfer Data				
Current Unit: '	15			
Current Building: I	A-00-18001			
*New Unit:	T			
*Transfer Effective Date:				
Tenant Paid Rent:				
Mandatory Charges:				
Rental Subsidy:				
Utility Allowance:				
Gross Rent:	\$0.00			
Maximum Section 42 Pont	\$0.00			
Maximum HOME Pont	\$0.00			
	\$097.00			
Transfer Cancel				
			· · · · · · · · · · · · · · · · · · ·	
Click the down arr	ow in *New U	nit to show available	units ¹⁶	and select
the unit to transfe	r to. Once	selected, complete all fields		
*Transfer Effective Date:				
Tenant Paid Rent:				
Mandatory Charges:		-		
Rental Subsidur				
Utility Allowance:		•		
then click Transfer	at the bot	tom of the page.		

@

TRANSFER BETWEEN BUILDINGS – Based on 8609 election when allowable.

Select the project and click on				Pr	oceed	to Build	lings							
	Certification	n Portal	Your Entity Name	ñ	Projects	Templates	On-Site I	Managers			٠	•	🔂 Admin	IFA
s	Projects howing 1 - 300 of 590	0 records	Import All Building Data Uploa	d Files	Annual Ow	vner Certificatior	Pro	ceed to Buildings					â	+
	Project ID Proje				9			Annua Status	l Owner Certification Last Submission Date	Build	lings	C	Contact Us	-
Q	00-18	WINTER S 754 Icicle Wa	OLSTICE ay, SPIRIT LAKE, IA 513600000					Not Submitted	01/19/2018	2			@	

Select the building and click Proceed to Units

 General Information Import All Building Data Upload Files 	Pr Add	roject: 0 ress: 754 Icicle W port Building Dat	0–18–V Iay, SPIRIT LAKE, a View Details	VINTER IA 51360-0000 5 Change Rep	SOLSTICE	» Building	JS Units	Reports Clo	5e	â	` @ 🖶
Annual Owner Certification			Placed In	Last Papart	Current Reporting	IPS Compliance	HOME	Agency	Topont Pocort	Last	
Buildings (2)		Building ID	Service Date	Date	Period	Status	Compliance Status	Compliance Status	Status	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		<u>12</u>
	Q	IA-00-18002	12/19/2001	12/31/2017	01/01/2018 - 12/31/2018	In Compliance	In Compliance	In Compliance	Ready		<u>8</u>

Select the unit that is transferring OUT and click Unit Transfer

General Information	Bu	ilding	ID: IA-0	0-1800	1 » Units					
Import Building Data	Projec	t: 00-18 - WI	NTER SOLSTICE							
Change Report Period	New	/ Unit U	Init Definition	Income & Rent	Test New Tenan	t Cert Delete Tenant Certs N	Move Out Unit Transf	er Ready All U	nits Close	Y
Units		Unit ID	No. of	Square	Status	Head of Housebold	SZN	Last Certification	Re-Certification	Ready
Reports		Onicid	Bedrooms	Footage	Status	Thead of Household	5514	Date	Due Date	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					✓
Current I Current I *Transfer Effecti Tenant Pa Mandatory Rental Utility All	ent Unit: Building: lew Unit: ive Date: aid Rent: Charges: Subsidy: lowance:	: 10 : IA-00-1800 : : \$50 : \$5	1 v 00.00 \$0.00 \$50							
Maximum Section	42 Rent	: \$5:	\$0.00 \$0.00 97.00							

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.



END OF SECTION 5



MANUAL MOVE OUT



Select the project and click Proceed to Buildings

	Certification Po	tal Your Entity Name	ñ	Projects	Templates	On-Site Managers		٠	?	😽 Admin IFA
S	Projects Showing 1 - 300 of 590 recor	ds Import All Building Data Uploa	d Files	Annual Ov	vner Certificatior	Proceed to Buildings	T			8 🖶
	Project ID	Proje	ect Name	2		Annual Status	Owner Certification Last Submission Date	Buildings	Co	ontact Us
Q	00-18 WIN 754 I	TER SOLSTICE icle Way, SPIRIT LAKE, IA 513600000				Not Submitted	01/19/2018	2		@

Select the building and click Proceed to Units

 General Information Import All Building Data Upload Files 	Pr Add	roject: 0 ress: 754 Icicle W port Building Dat	0–18 – V /ay, SPIRIT LAKE, a View Details	VINTER IA 51360-0000 5 Change Rep	SOLSTICE	» Building	DS JS	Reports Close	e 🔽	â	@
Annual Owner Certification			Placed In	Last Papart	Current Poporting	IPS Compliance	HOME	Agency	Topant Pocort	Last	
Buildings (2)		Building ID	Service Date	Date	Period	Status	Compliance Status	Compliance Status	Status	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		<u>12</u>
	Q	IA-00-18002	12/19/2001	12/31/2017	01/01/2018 - 12/31/2018	In Compliance	In Compliance	In Compliance	Ready		<u>8</u>

Select the unit and click Move Out

General Information	Bu	ilding	ID: IA-0	0-1800	1 » Units					
Import Building Data	Projec	ct: 00-18 - WI	NTER SOLSTICE				•			
Change Report Period	Nev	v Unit U	Init Definition	Income & Rent	Test New Tenan	t Cert Delete Tenant Certs	Move Out Unit Transfe	er Ready All U	nits Close	Y
Units		Unit ID	No. of	Square	Status	Head of Household	SSN	Last Certification	Re-Certification	Ready
Reports		onicito	Bedrooms	Footage	Status	neud of nouschold		Date	Due Date	Subm
	Q	09	2	843	Occupied by Tenant	Test	111-11-1111	12/23/2018		
	Q	10	2	.843	Occupied by Tenant	Seb., C.	111-11-11	12/27/2018		
	Q	11	2	843	Occupied by Tenant	Ка, Ј.	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					~
Enter *Move Unit ID: 10 Project: 00-18 - WINT	e Out D) » (ER SOLS	Date: Unit M	ove Out : 1A-00-18001	then cl	ick Move O	at the bottom of	f the page.			@ 🖶
Building ID:	IA-00-1	8001								
Unit ID:	10									
Head of Household:	Seb., C.									
*Move Out Date:			-							
Move Out	Can	cel								

3RD PARTY SOFTWARE TENANT DATA IMPORT

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



UPLOADING ALL BUILDING XML FILE

If the 3rd party software (i.e. Yardi, RealPage, etc) creates an XML file that includes <u>all buildings</u> in the project,

Certification Portal	Your Entity Na	ime 🏫	Projects Templates	On-Site Managers		٠	🕜 😽 Admin I
Projects Showing 1 - 300 of 590 records	Import All Building Data	Upload Files	Annual Owner Certificatio	n Proceed to Buildings			â
Project ID	1	Project Name		Annua Status	al Owner Certification Last Submission Date	Buildings	Contact Us
Q 00-18 WINTE 754 lcicle	R SOLSTICE Way, SPIRIT LAKE, IA 513600	000		Not Submitted	01/19/2018	2	@
General Information	Project: 00- Address: 754 Icicle Way,	-18 - WIN Spirit lake, ia 513	ITER SOLST	TICE » Upload	All Building	Data	合(
Upload Files	*Please Browse to Select	: the Document: C	hoose File No file cho	sen			
Buildings (2)		_					
	.↓		Overwrite existing Unit	Activity			
	Upload Document Ca	ncel	•				
	Chassa Fila	No filo choso			_	1	
lick on Choose Fil	Choose File	No file chose	en	ΛΓ]	
lick on Choose Fil	Choose File	No file chose	en	ΔF			
lick on Choose Fil elect the XML file	e Choose File created by th	No file chose e 3 rd party	en software (typ	pically found on t	the C: drive)]	
lick on Choose Fil elect the XML file	e Choose File created by th	No file chose e 3 rd party	en software (typ	pically found on t	the C: drive)]	
lick on Choose Fil elect the XML file	e created by th	No file chose e 3 rd party	en software (typ • Music	Dically found on the second se	the C: drive)]	
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lick on Choose Fil elect the XML file	e created by th	No file chose e 3rd party • • • • • • • • • • • • •	en software (typ > Music	Dically found on the second of	the C: drive)		
lick on Choose Fil elect the XML file	e created by th © Organize D This Netw	No file chose e 3 rd party • • • • • • • • • • • • • • • • • • •	en software (typ • Music	Dete modified No items match your search.	the C: drive)		
lick on Choose Fil elect the XML file	e created by th © © © © © © Netw '	No file chose e 3 rd party • • • • • • • • • • • • • • • • • • •	en software (typ > Music	Dically found on the second se	the C: drive)		
lick on Choose Fil elect the XML file	e created by th	No file chose e 3rd party This PC New folder PC Na	en software (typ > Music	Dically found on the second se	the C: drive)		
lick on Choose Fil elect the XML file	e Choose File created by th © Organize D This Netw I	No file chose e 3 rd party • • • • • • • • • • • • • • • • • • •	en software (typ • Music	Date modified No items match your search.	the C: drive)		
lick on Choose Fil elect the XML file	e created by th © © © © © © © © © © © © ©	No file chose e 3 rd party • • • • • • • • • • • • • • • • • • •	en software (typ > Music	Determodified No items match your search.	the C: drive)		
lick on Choose Fil elect the XML file	e created by th Created by th Created by th Created by th	No file chose e 3 rd party • • • • • • • • • • • • • • • • • • •	en software (typ • Music	Dically found on Open C Searc Date modified No items match your search.	the C: drive)		
lick on Choose Fil elect the XML file	e Choose File created by th © Organize D This Netw '	No file chose e 3 rd party • • • • • • • • • • • • • • • • • • •	en software (typ • Music	Date modified No items match your search.	the C: drive)		
lick on Choose Fil elect the XML file	e created by th © Organize © Netw '	No file chose e 3 rd party • • • • • • • • • • • • • • • • • • •	en software (typ ≻ Music	Date modified Date modified No items match your search	the C: drive)		
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lick on Choose Fil elect the XML file elect the XML file	e Choose File	No file chose e 3 rd party • • • • • • • • • • • • • • • • • • •	en software (typ Music ame	Dete modified Dete modified No items match your search.	the C: drive)		
lick on Choose Fil elect the XML file elect the XML file elect the XML file	e Choose File	No file chose e 3 rd party • • • • • • • • • • • • • • • • • • •	en software (typ Music arre arre k Upload Doc	Date modified Date modified No items match your search.	the C: drive)	rs. After th	e initial

<u>UPLOADING SINGLE BUILDING(S)</u> – Even when multiple building in the project.

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

Highlight the projec	t and click	d to Buildings							
Certification Portal	Your Entity Name	rojects	Templates	On-Site Managers			٠	8 🖏	Admin IFA
Projects Showing 1 - 300 of 590 records	Import All Building Data Uploa	d Files Annual Ow	mer Certification	Proceed to Build	ings				중 🖶
Project ID	Proje	ect Name		Statu	Annual Owner Certific	ation mission Date	Buildings	Contact	Us
Q 00-18 WINTER 754 Icicle W	SOLSTICE Vay, SPIRIT LAKE, IA 513600000			Not Submit	ed 01/1	19/2018	2	@	
Select the building t	hat matches the X	(ML file and	l click 🗖	nport Building D	ata				
Certification Portal Your Entity	v Name 🕋 Projects Templates	On-Site Managers						¢ 0	ddmin IFA
General Information Import All Building Data Upload Files	0-18 - WINTER SOLSTI Vay, SPIRIT LAKE, IA 51360-0000 La View Details Change Report Period	CE » Buildings Submit Tenant Certs Proceed	i to Units Reports	Close					6 C 6
Annual Owner Certification Buildings (2) Q IA-00-18 Q IA-00-18	Placed In Service Date Last Re 0001 12/19/2001 12/2 0002 12/19/2001 12/3	2007 Date Curren 31/2017 01/01/ 31/2017 01/01/	nt Reporting Period 2018 - 12/31/2018 2018 - 12/31/2018	IRS Compliance Status In Compliance In Compliance	HOME Compliance Status In Compliance In Compliance	Agency Compliance Status In Compliance In Compliance	Tenant Recert St. Ready Ready	atus Last Subr Date	nission 2 Units 12 8
Click on	file chosen	R			_			* 0	
General Information Building ID	: IA-00-18001 » Upload	Data						* 0	 ▲ Admin IP/ ▲ @ €
Import Building Data Project: 00-18 - WINTER Change Report Period Please Browse to Select Units	SOLSTICE the Document: Choose File No file chosen			←					
Reports	Overwrite existing Unit Activity								
Upic	Dad Document Cancel								
*Please Browse to Select	t the Document: Ch	oose File	lo file chos	sen					
Solact the XML file :	open Open	and then		oad Document	at the bott	om of the C	D scroon	to con	nnlote
the process. This m	ust be done for all	buildings.					Juicen		piece
	C C Organize	This PC Music New folder	Ope	n v C Sear	ch Music p				
	4 😵 Netwo	ork	Ν	to items match your search.	in an				

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 Project: 00-18 - WINTER	: IA-00-18(solstice	001 » Uni	its				Ţ	
New Unit Unit D	efinition Income & F	Rent Test New	w Tenant Cert De	elete Tenant Certs	Move Out	Unit Transfer	Ready All Units	Close
Go back to Pro	ceed to Buildings	and click	roceed to Units	and click on	Ready Al	l Units	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

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

Found transaction record(s) for an existing Project different than Project currently selected.	

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

Download and Upload Forms And Annual and Inspection Documents



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

Pr ick on	to access Project	ts list. Select the project	and click Upload Files	1	
Certificatio	n Portal Your Entity Name	A Projects Templates On-S	ite Managers	*	Admin I
rojects wing 1 - 300 of 59	0 records Import All Building Data Up	load Files Annual Owner Certification	Proceed to Buildings		ĉ
Project ID	Р	roject Name	Annual Owner Certificat Status Last Subm	ion Buildings ission Date	Contact Us
00-18	WINTER SOLSTICE 754 lcicle Way, SPIRIT LAKE, IA 513600000		Not Submitted 01/19	J/2018 <u>2</u>	@
dress: 754 lcicl Aiscellaneous Showing 0 -	e Way, SPIRIT LAKE, IA 51360-0000		Close		
	Document Name	Original File Name	Reporting Period	Uploaded By	Submit Status
_{:k on} [] New Fi	NEW icon to search f	There are no documents to s	how in this view.		
ding a new fi	le to the system. ormation Document Type: Miscellaneous *Document Title:		•		
- Document	Vpload *Select File: Choose File	No file chosen			
	f iscellaneous		vill always be Miscell	aneous	
ocument Type: N			vill always be wilseen	uncous	

G	Open		X
🔄 🔄 👻 🕆 🚺 🕨 This PC 🔸 Music	V C Search N	Music	Q
Organize • New folder		III • 🔲	0
This PC Name	Date modified	Туре	Siz
۲ الله name	III	PS	>

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 upl	oading one se	t of files, click	Save & Close, if uploading more than one set of files, click	Save & New
until all fil	es have been i	uploaded and 1	Save & Close	

END OF SECTION 8

SECTION 9 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.

 General Information Import All Building Data 	Project: 00-18 - WINTER SOLSTICE » General Information Address 754 Icicle Way, SPIRIT LAKE, IA 51360-0000 Owner Total Data Sold Parts Sold Parts	â@ 4
Upload Files	*New Certification	
Annual Owner Certification	Period:	
Buildings (2)	 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	-
	B Save Save & Close Submit Certification Cancel Annual Owner Certification Form	



REVIEWING DATA AND SUBMITTING TO AGENCY



REVIEWING UNIT DATA AND READYING UNITS FOR SUBMISSION.

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	Reports				
	General Information Import Building Data	Building ID: IA-00-01002 » Reports Project: 00-01 - Meadow Crest Gardens I	Close		合 문
Þ	Change Report Period	LIHTC/HOME Annual Occupancy		Show only last 4 digits of SSN in reports	
Þ	Units	Run Report for all Buildings			
Þ	Reports	Household Income & Rent Limits Status			

These reports can also be downloaded to Word or Excel.

L		HTC In Ru	C /HOME clude unit in Report	Annual O ts without for all Bu	ccupancy recent act ildings	tivity							🗷 She	ow only	last 4 c	digits	of SS	SN in	repo	rts
D	etail Re	eport																	I 🗐 .	I 🗐
Your	Entity	Nam C/H	^{ne} HOME	Annu	ial Occ	upanc	y Repo	ort		STU 1 - 2 - 3 - 4 - 5 - 6 -	JDENT EXPLAN TNAF assistan Job Training F Single parent Married/joint Previous Foste Extended-Use	NATION ce. Program. (dependent return. er Care. Period.	child.		Generated o	on 7/23/2	019 by A	dmin IFA	Page	1 of 1
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
09	Buildin 843	g: IA 2	-00-18001, T	otal Number	r of Units: 12	Rees,	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		Ν	73	\$19,622.48						1	Ν		N
12	843	2	10/01/2014		###-##-1111	Jimenez, John	12/01/2017		N	85	\$16,624.31						1	N		N 🗸
									Pa	ae 1 of '	1									

Household Income & Rent Limits Status

D	etail R	eport												🚔 I 🛍 I 💐
Your	Entity	Name									Gen	erated on 7,	/23/2019 by A	dmin IFA Page 1 of 1
Ho	bus	ehold Incom	e & R	ent Liı	nits St	atus	Repor	t						
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
Pro	oject: (Buildii	00-18 WINTER SOLSTICE, Pi ng: IA-00-18001, County: Di	roject Addres ckinson	s: 754 Icicle \	Way									
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.



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)

Ready to Submit	Ready to Submit
_	⊻
_	⊻
_	⊻
_	⊻
_	⊻
	⊻
_	⊻
_	⊻

To manually check the keedy to Submit: vou 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

MANAGEMENT CONTROLS (SUPER USER)



On-Site Managers			
Manage On-Site Managers			
On-Site Managers Showing 0 - 0 of 0 records	New Reset Password Ur	nlock Projects	ô 8
Full Name	Login Name	Email	Financial Manager Only
	There are no on-site	e 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:	*First Name:
Middle Name:	Middle Name:
*Last Name:	*Last Name:
*Email:	*Email:
Financial Manager Only: 🔲	Financial Manager Only:
Login Information	Login Information
*I Jser Name	*User Name:
*D	*D
*Password:	*Password:
Save Save & New Save & Close Cancel	B Save Save &
Reset Password	Reset Password
On-Site Manager » Test Tested Existing on-site manager configuration.	On-Site Mana Existing on-site manager config

	×					
This site says						
Are you sure you want to reset this on-site manager's password?						
Don't let this page create more messages						
ОК	Cancel					



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

Project Assignment

On-Site Manager Project Assignment

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Select On-Site Manager For Pro	oject 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.



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

DRAFT