

## CERTIFICATION PORTAL (CP)



Formally known as: Certification Online (COL)

### A HOW-TO GUIDE FOR ANNUAL REPORTING

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JULY 2020






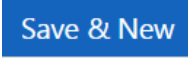
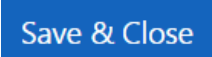
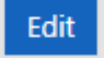
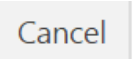




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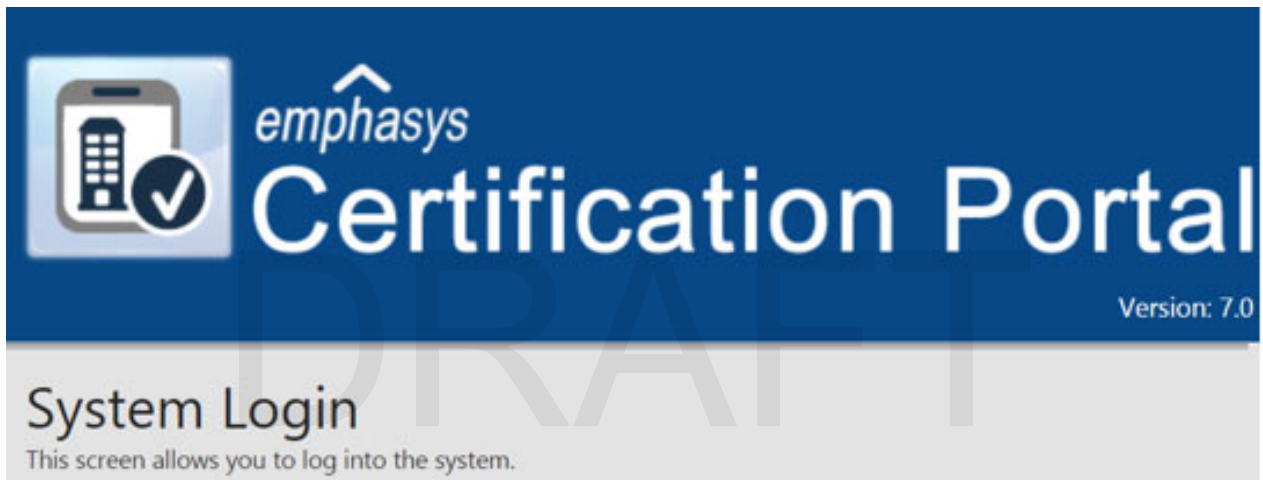
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## LEGEND

	Return to the Landing Page (Snapshot)
	Search or Sort
	Undo, Clear search
	Review/Select
	Save entry
	Save entry and create additional entries
	Save entry and close screen
	Make changes
	Delete entry and go back to previous screen
	Export to Excel
	Export to Word
	Submit to Agency
	Delete Record

# SECTION 1

## LOGGING IN

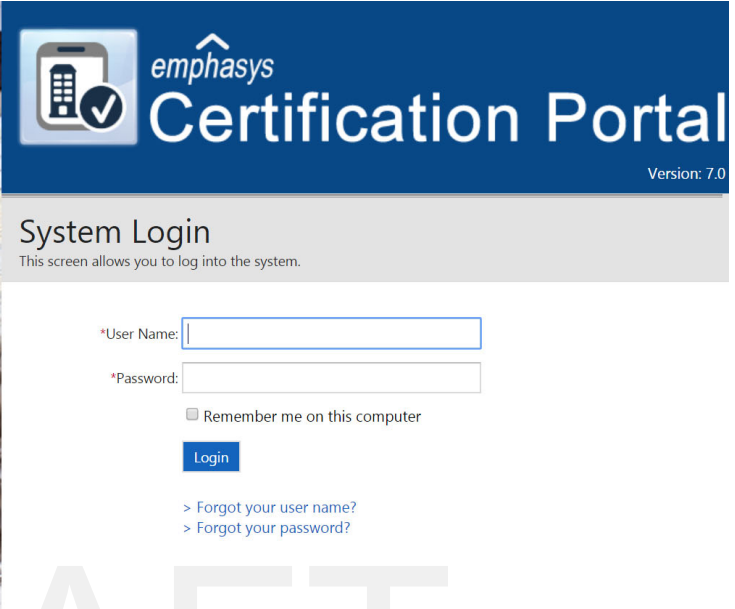



## New (Super) User

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

## New Non-Super User

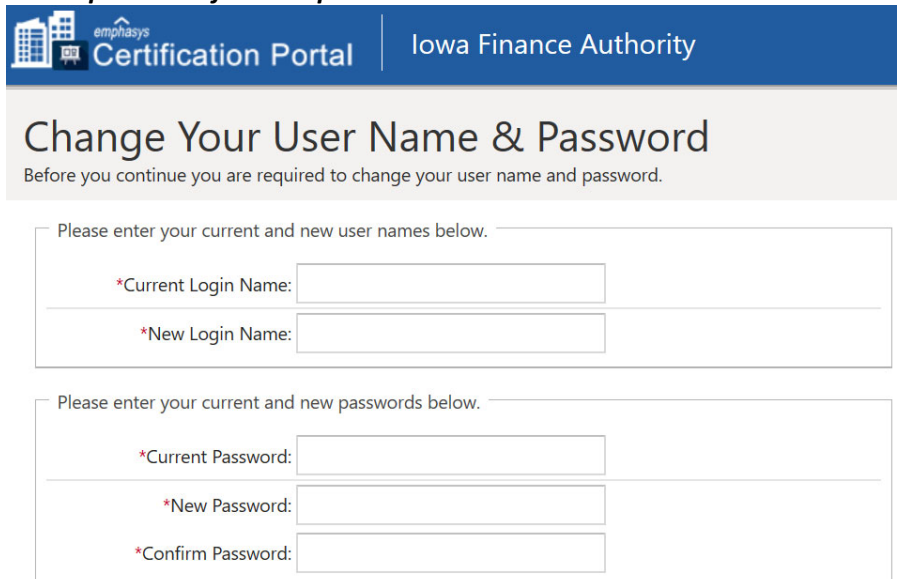
If you are a new user assigned by the Super User, the Super User will set up your User ID, Password and assign specific projects to you. Contact your Super User for log in credentials.



## New Super and Non-Super 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)

**Projects Status & Search**

Project ID:

Project Name:

Grantee Number:

IDIS Activity Number:

**Annual Owner Certifications Submission Status**

9 Not Submitted  
377 Not Submitted  
4 Submitted

**Recently Viewed Projects**

00-01 Meadow Crest Gardens	12 Buildings
00-18 WINTER SOLSTICE	2 Buildings
00-03 GRAY HARES APTS	1 Building
07-42 Hilly Haven	9 Buildings

### EXISTING (COL) User

**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

> [Forgot your user name?](#)  
> [Forgot your password?](#)

> [Forgot your user name?](#)

Enter e-mail address and click

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

> [Forgot your password?](#)

Enter e-mail address and click



### 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.

Project ID	Project Name	Buildings
00-18	WINTER SOLSTICE	2 Buildings
07-42	Hilly Haven	9 Buildings
00-03	GRAY HARES APTS	1 Building

**Option 1:** Click on [View All](#)

**Option 2:** Click on [Projects](#) 

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

Project ID	Project Name	Annual Owner Certification		Buildings	Contact Us
		Status	Last Submission Date		
00-03	GRAY HARES APTS 153 Crooked Lane, DUBUQUE, IA 520010000	Not Submitted	01/19/2018	1	
00-18	WINTER SOLSTICE 754 Icicle Way, SPIRIT LAKE, IA 513600000	Not Submitted	01/19/2018	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.

emphasys Certification Portal | Your Entity Name | Projects | Templates | On-Site Managers | Admin IFA

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

Showing 1 - 1 of 1 records

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

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	@

**Recently Viewed Projects**

00-18	WINTER SOLSTICE	2 Buildings
07-42	Hilly Haven	9 Buildings

**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.




emphasys Certification Portal | Your Entity Name | Projects | Templates | On-Site Managers | Admin IFA

**Project: 00-18 - WINTER SOLSTICE » General Information** | Close

Address: 754 Icicle Way, SPIRIT LAKE, IA 51360-0000

Oops! Something went wrong.  
This page didn't load Google Maps correctly. See the JavaScript console for technical details.

754 Icicle Way, IA 51360-0000

<b>Electronic Documents</b>  <b>0</b>	<b>Annual Owner Cert</b>  <b>Not Submitted</b>	<b>Buildings</b>  <b>2</b>
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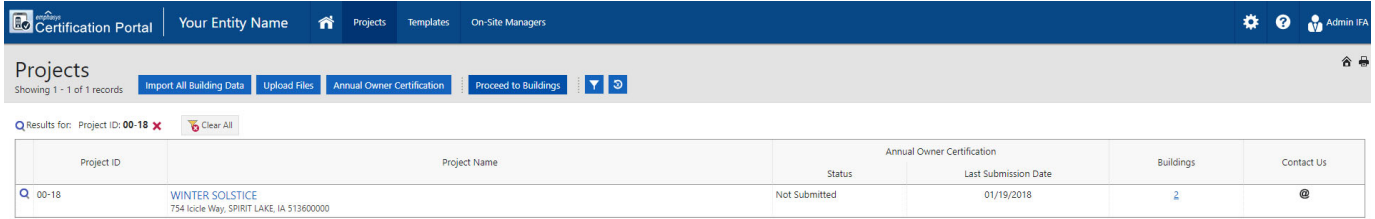
Projects



**Option 5:** Click on



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



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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

Certification Portal | Your Entity Name | Projects | Templates | On-Site Managers

Projects

Showing 1 - 1 of 1 records

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

Q Results for: Project ID: 00-18 x Clear All

Project ID	Project Name	Status	Annual Owner Certification 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 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

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

\*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.

**Unit: 09, Tenant: VACANT » General Information**

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

**Head of Household Information**

\*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 Assistance 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**

Home Phone:  -  -  Work Phone:  -  -

Email:

**Transfer Information**

Transferred From Building:

Old Unit ID:  Old Unit Move-In:

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

**Head of Household Information**

\*Member Name:  Social Security Number:

\*Birth Date:  Age:  Occupation:

Sex:  Marital Status:

Ethnicity:  Race:

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.

**Household Data**

\*Move-In Date:  Household Annual Income:  \*Unit Assistance Type:

\*New Cert Date:  Non Qualified Students:  Owner's Designation: LIHTC

Initial Certification:  Family Size:  Restriction: 30/50 (HOME - VLI)

Ready to Submit:

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

**Contact Information**

Home Phone:  -  -  Work 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 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

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



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

Member Information

\*Member Name:  

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 & Amount

Source of Income:  

Annual Income:  **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:

Pay Frequency:

**Apply** **Cancel**



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

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
<input type="checkbox"/> Seb., C. Head of Household	Social Security/Pensions	11/06/2017 - Not Verified	\$12,852.00
<input type="checkbox"/> 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  on the menu on the left side of the screen.

Unit: 10, Tenant: Seb., C. » Assets

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 Asset](#) [Close](#)

<input type="checkbox"/>	Member Name	Type of Asset	Verification	Cash Value	Annual Income
<input type="checkbox"/>	Seb., C. Head of Household	Other	11/06/2017 - Not Verified	\$4,000.00	\$6.00
<input type="checkbox"/>	Seb., C. Head of Household	Other	11/06/2017 - Not Verified	\$5,000.00	\$0.50
<input type="checkbox"/>	Seb., C. Head of Household	Other	11/06/2017 - Not Verified	\$6,000.00	\$0.60
<input type="checkbox"/>	Seb., C. Head of Household	Other	11/06/2017 - Not Verified	\$1,545.00	\$12.36
				<b>\$16,545.00</b>	

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.


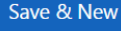
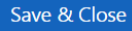
Member Information  
\*Member Name: Seb., C. Relation: Head of Household

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 Verification Source and Verification Date.

Asset Verification  
Verification Source:  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.

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



Unit: 10, Tenant: Seb., C. » Unit Rent

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

Rent Change Date:


Tenant Paid Rent: **\$500.00**

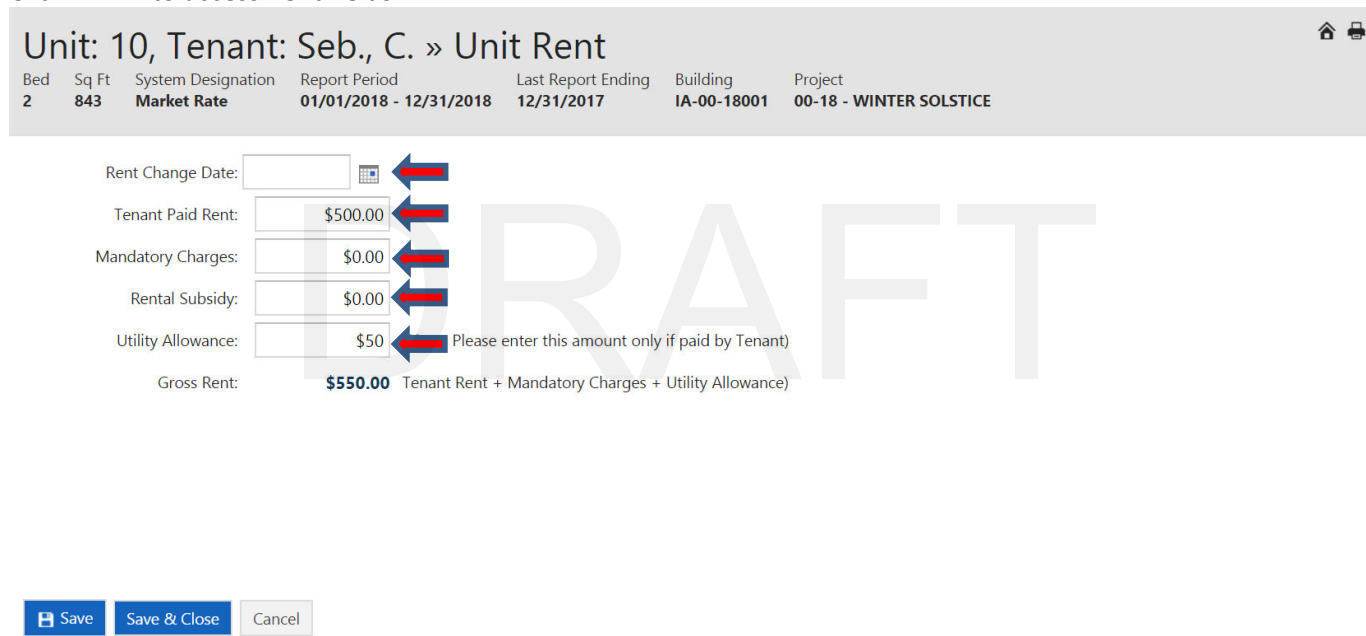
Mandatory Charges: **\$0.00**

Rental Subsidy: **\$0.00**

Utility Allowance: **\$50** (Note: Please enter this amount only if paid by Tenant)


Gross Rent: **\$550.00** Tenant Rent + Mandatory Charges + Utility Allowance)

Click  Edit to access Rent fields.



Unit: 10, Tenant: Seb., C. » Unit Rent

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

Rent Change Date:  

Tenant Paid Rent:

Mandatory Charges:

Rental Subsidy:

Utility Allowance:  Please enter this amount only if paid by Tenant)

Gross Rent: **\$550.00** Tenant Rent + Mandatory Charges + Utility Allowance)

When all data compete for a unit, click  Save & Close 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 Agency 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 6<sup>th</sup> year of the Affordability Period).

Select the project and [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	@

Select the building then click [Proceed to Units](#)

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
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 then click [New Tenant Cert](#)

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	Occupied by Tenant	Test	111-11-1111	12/23/2018		—
10	2	843	Occupied by Tenant	Seb., C.	111-11-1111	12/27/2018		—

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

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

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:

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**

Enter New Cert Date   and click

Click on member name then

Unit: 10, Tenant: Seb., C. » Income

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

<input type="checkbox"/>	Member Name	Source of Income	Verification	Annual Income
<input type="checkbox"/>	Seb., C. Head of Household	Social Security/Pensions	11/06/2017 - Not Verified	\$12,852.00
<input type="checkbox"/>	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**

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  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:

Annual Income:

Income Verification

Verification Source:

Verification Date:

Click

# 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**

Income Verification

Verification Source: **Not Verified**

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

DRAFT

# New Income

Adding a new income to the system.



Member Information

\*Member Name:

Relation:

Income Source & Amount

Source of Income:

Annual Income:



Income Verification

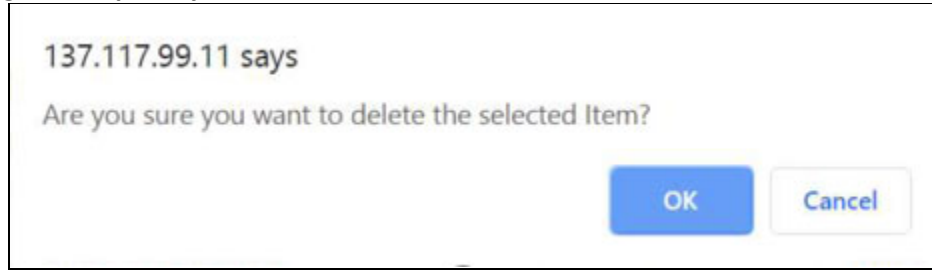
Verification Source:

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.**



### Save & Close

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** - Agency **does not** accept the CP system generated form.

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 Agency Tenant Certification Form is located on IFA's website and within the CP un

Miscellaneous 

Miscellaneous

Showing 1 - 2 of 2 records

Template Name	Original Template Name	Uploaded By	Uploaded On
<a href="#">Owner Cert</a>	a. 2018 Owner Certification.docx	Admin IFA	07/12/2019
<a href="#">Exhibit E - Utility Allowance</a>	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 Close

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

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	<b>Below Income Limit</b>
Rent Limits	<b>04/01/2018</b>	\$0.00	<b>Over Rent Limit</b>

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**

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**

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


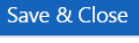
Member Name: **Seb., C.** | Social Security Number: **111-11-1111**

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**

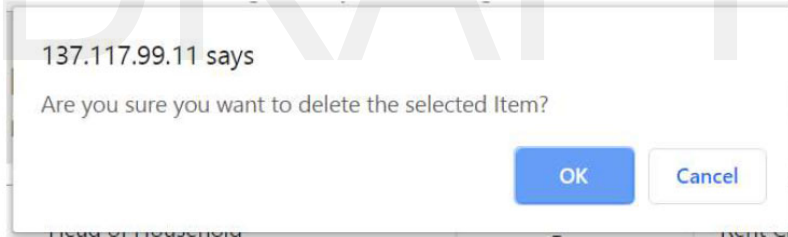
Move-In Date: 12/22/2018 Household Annual Income: \$0.00 \*Unit Assistance Type: No Assistance

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.



## 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**

empasys 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		Buildings	Contact Us
		Status	Last Submission Date		
00-18	<b>WINTER SOLSTICE</b> 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 | Annual Owner Certification | **Buildings (2)**

**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
IA-00-18001	12/19/2001	12/31/2017	01/01/2018 - 12/31/2018	In Compliance	In Compliance	In Compliance	Ready		12
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 | Change Report Period | **Units** | Reports

**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
09	2	843	Occupied by Tenant	Test	111-11-1111	12/23/2018		—
10	2	843	Occupied by Tenant	Seb., C.	111-11-1111	12/27/2018		—
11	2	843	Occupied by Tenant	Ka, J.	111-11-1111	06/01/2018		—
12	2	843	Occupied by Tenant	Ji, J.	111-11-1111	12/01/2017	12/01/2018	—
13	2	843	Occupied by Tenant	Mu, D.	111-11-1111	12/01/2017	12/01/2018	—
14	2	843	Occupied by Tenant	Gol, D.	111-11-1111	12/01/2017	12/01/2018	—
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: IA-00-18001

\*New Unit:  

\*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](#)


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](#)

Certification Portal | Your Entity Name | [Home](#) | [Projects](#) | [Templates](#) | [On-Site Managers](#) | [Settings](#) | [Help](#) | [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		Buildings	Contact Us
		Status	Last Submission Date		
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

	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
<input type="checkbox"/>	IA-00-18001	12/19/2001	12/31/2017	01/01/2018 - 12/31/2018	In Compliance	In Compliance	In Compliance	Ready		12
<input type="checkbox"/>	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

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


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  to show available units  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  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**

empdays Certification Portal | Your Entity Name | Home | Projects | Templates | On-Site Managers | Settings | Help | 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		Buildings	Contact Us
		Status	Last Submission Date		
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 | Annual Owner Certification | **Buildings (2)**

**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
IA-00-18001	12/19/2001	12/31/2017	01/01/2018 - 12/31/2018	In Compliance	In Compliance	In Compliance	Ready		12
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 and click **Move Out**

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

**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
09	2	843	Occupied by Tenant	Test	111-11-1111	12/23/2018		—
10	2	843	Occupied by Tenant	Seb., C.	111-11-1111	12/27/2018		—
11	2	843	Occupied by Tenant	Ka, J.	111-11-1111	06/01/2018		—
12	2	843	Occupied by Tenant	Ji, J.	111-11-1111	12/01/2017	12/01/2018	—
13	2	843	Occupied by Tenant	Mu, D.	111-11-1111	12/01/2017	12/01/2018	—
14	2	843	Occupied by Tenant	Gol, D.	111-11-1111	12/01/2017	12/01/2018	—
15	2	843	Occupied by Tenant	La, P.	111-11-1111	12/01/2017	12/01/2018	—
16	2	843	Vacant					✓

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**

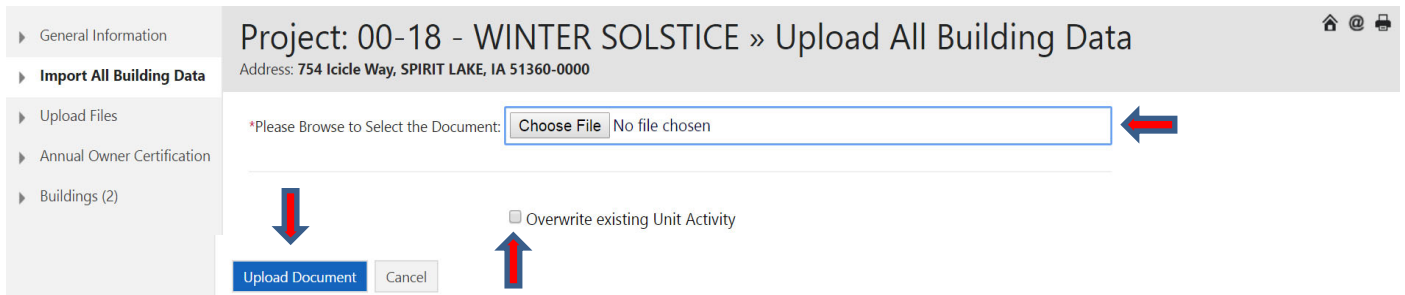
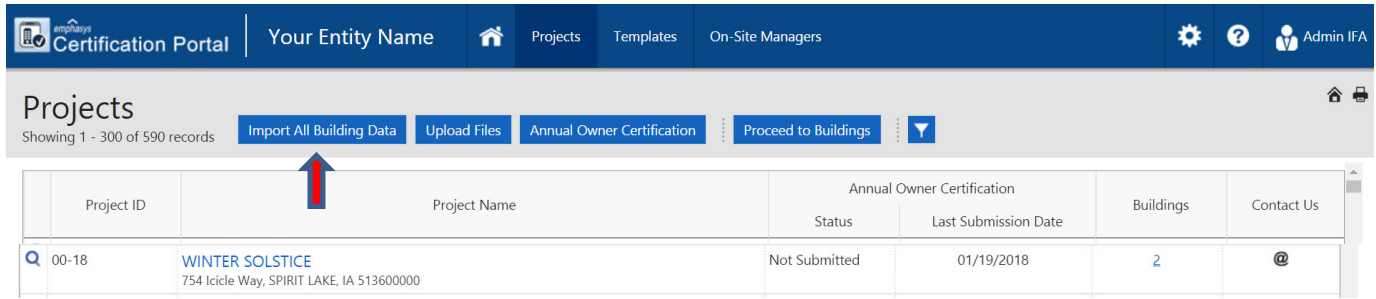
### **3<sup>RD</sup> PARTY SOFTWARE XML TENANT DATA IMPORT**

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

DRAFT

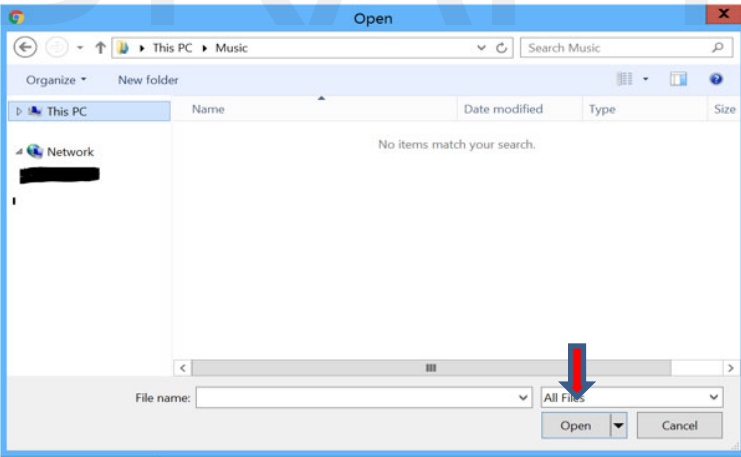
## UPLOADING ALL BUILDING XML FILE

If the 3<sup>rd</sup> 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 3<sup>rd</sup> party software (typically found on the C: drive)



Select the XML file, click  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**

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

Select the building that matches the XML file and click

**Import Building Data**

emphasys Certification Portal | Your Entity Name | Projects | Templates | On-Site Managers | Admin IFA

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
IA-00-18001	12/19/2001	12/31/2017	01/01/2018 - 12/31/2018	In Compliance	In Compliance	In Compliance	Ready		12
IA-00-18002	12/19/2001	12/31/2017	01/01/2018 - 12/31/2018	In Compliance	In Compliance	In Compliance	Ready		8

Click on

**Choose File** No file chosen

emphasys Certification Portal | Your Entity Name | Projects | Templates | On-Site Managers | Admin IFA

Building ID: IA-00-18001 » Upload Data  
Project: 00-18 - WINTER SOLSTICE

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

Overwrite existing Unit Activity

**Upload Document** Cancel

\*Please Browse to Select the Document:

**Choose File** No file chosen

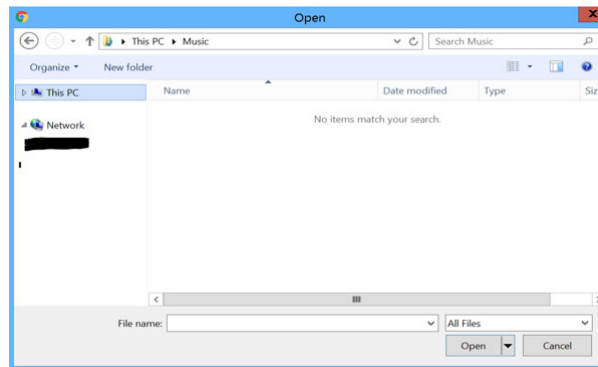
Select the XML file and click

**Open**

and then click

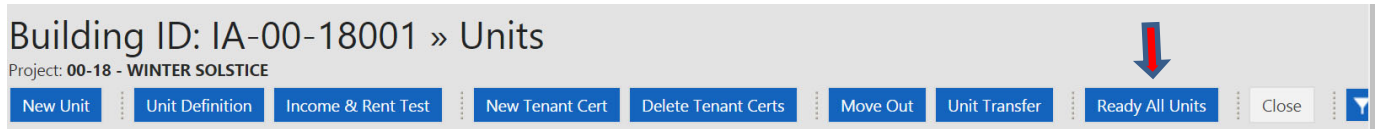
**Upload Document**

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.

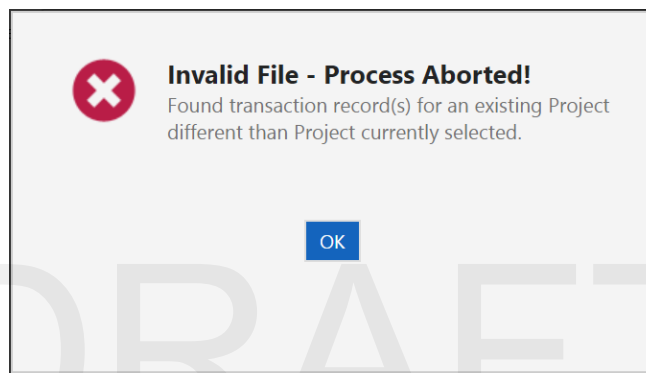
**NOTE: If user is unable to locate file on the computer, do a search for .xml and it should show up.**



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:



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 Agency 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**

DRAFT

**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**

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	@

Scroll to the bottom

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

Document Name	Original File Name	Reporting Period	Uploaded By	Submit Status
There are no documents to show in this view.				

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

**New File**  
Adding a new file to the system.

General Information

\*Document Type:  ←

\*Document Title:  ←

Document Upload

\*Select File:  No file chosen ←

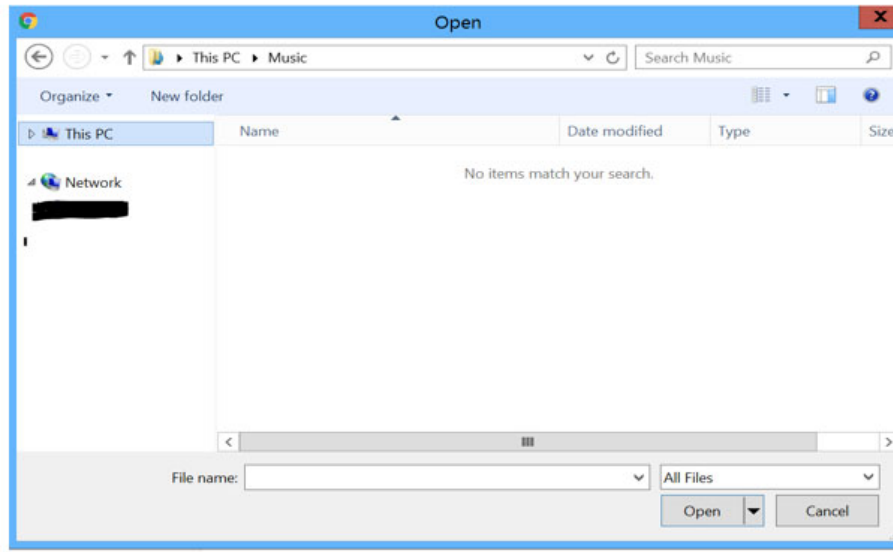
\*Document Type:  **Document Type will always be Miscellaneous**

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



Document Upload

\*Select 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).



If only uploading one set of files, click  , if uploading more than one set of files, click

until all files have been uploaded and then  .

**END OF SECTION 8**

**SECTION 9**  
**ANNUAL OWNER CERTIFICATION**

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## 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, Agency website and within CP system.

Project: 00-18 - WINTER SOLSTICE » General Information

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

\*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

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END OF SECTION 9

## **SECTION 10**

**REVIEWING DATA AND SUBMITTING TO AGENCY**

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**REVIEWING UNIT DATA AND READING UNITS FOR SUBMISSION.**

**Reports**

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

**Building ID: IA-00-01002 » Reports** Close

Project: **00-01 - Meadow Crest Gardens I**

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

**Household Income & Rent Limits Status**

These reports can also be downloaded to Word or Excel.

**LIHTC/HOME Annual Occupancy** Show only last 4 digits of SSN in reports

Include units without recent activity  
 Run Report for all Buildings

Detail Report

Your Entity Name: **LIHTC/HOME Annual Occupancy 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.

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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 Stndt Y/N	Qual Stndt Expln Code	Mrkt Unit Y/N
<b>Project: 00-18 WINTER SOLSTICE, Project Address: 754 Icicle Way</b>																				
<b>Building: IA-00-18001, Total Number of Units: 12</b>																				
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

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**Household Income & Rent Limits Status**

Detail Report

Your Entity Name: **Household Income & Rent Limits Status Report**


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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
<b>Project: 00-18 WINTER SOLSTICE, Project Address: 754 Icicle Way</b>														
<b>Building: IA-00-18001, County: Dickinson</b>														
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.**

General Information | Import Building Data | Change Report Period | 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



**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 3<sup>rd</sup> 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  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)**

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# 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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