



CERTIFICATION PORTAL (CP) USER GUIDE



Formally known as: Certification Online (COL)

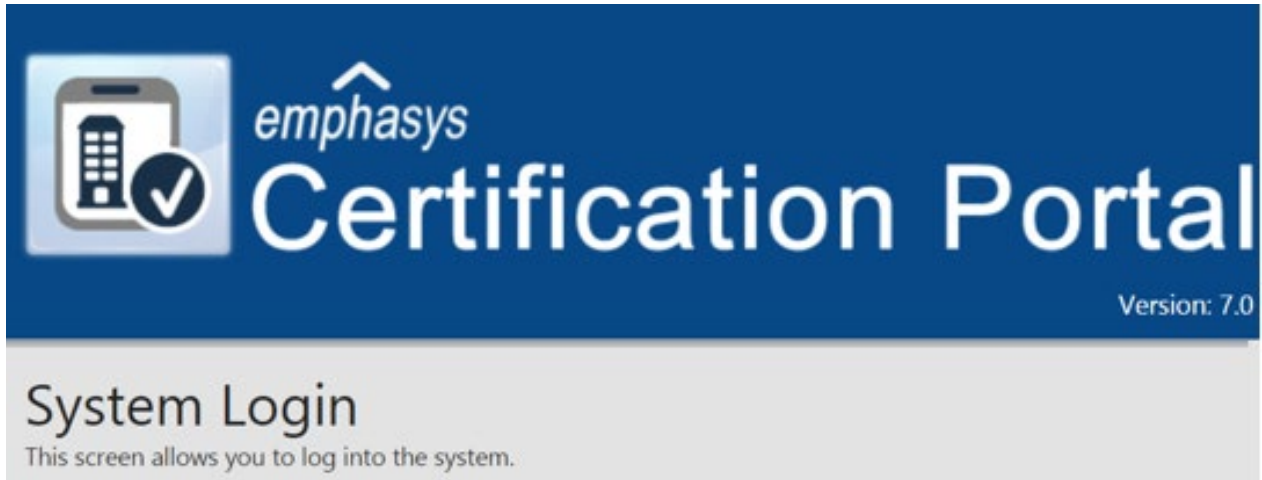
January 2025

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SECTION 1

LOGGING IN



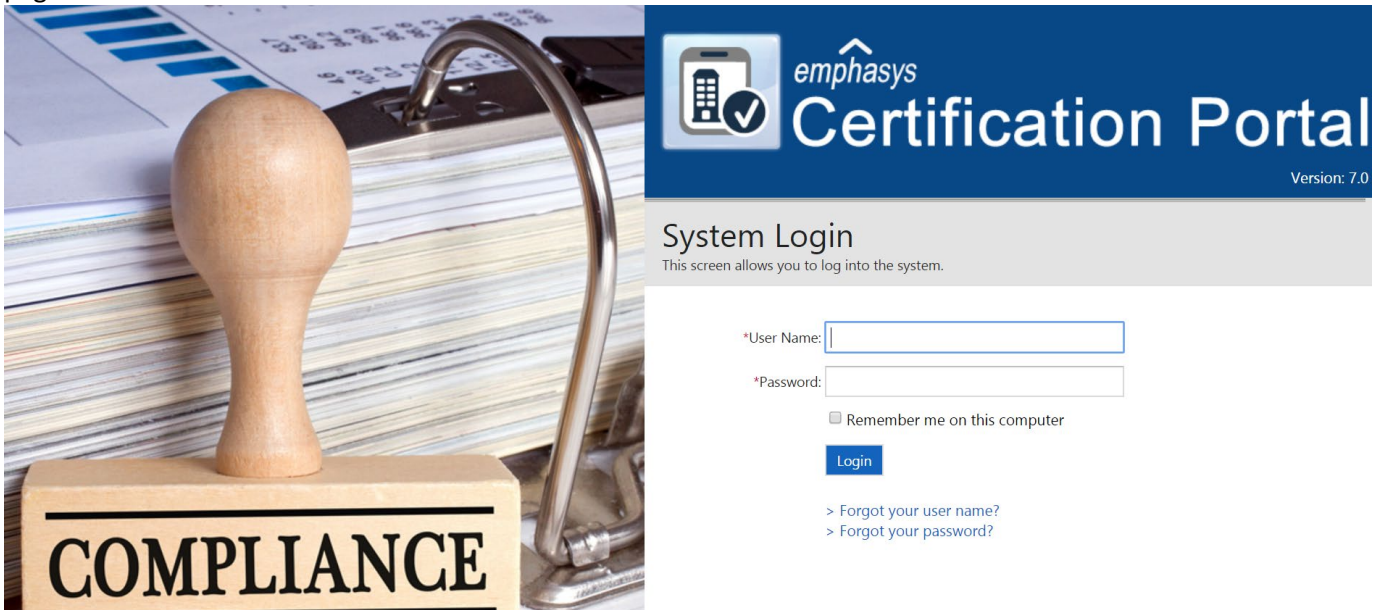
New (Super) User

If you are a new user who will have full control (Super User) of the CP, contact IFA 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 set-up and login credentials.



New super and non-super users will login using the IFA issued temporary User ID and Password at the System Login page.



New Users will be required to create a new User ID and Password. This is also the case when IFA resets a Super-user login and password.

NOTE: The username and password fields require at least 6 characters and are case sensitive.


Your Entity Name


 Tester2 IFA

Change Your Password

Before you continue you are required to change your password.

Please enter your current and new passwords below.

*Current Password:

*New Password:

*Confirm Password:

Continue

User Login screen





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

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

Forgot Username or Password

[> Forgot your user name?](#)

Enter e-mail address and click Submit



Recover Login Credentials

Please enter your email address in the box below.

Submit
Cancel

> [Forgot your password?](#)

Enter e-mail address and click

[Submit](#)



Recover Login Credentials

Please enter your email address in the box below.

[Submit](#)

[Cancel](#)

End Section 1

SECTION 2

ACCESSING PROJECTS

Once logged into CP, you will be on the Snapshot page and can access projects using 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 you to the screen below.

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. Project ID is for all programs, LIHTC, HOME or NHTF. Grantee Number and IDIS Activity Number is rarely used. Note: using this method requires the entries to be exact. (spelling, dashes, etc.)

Project ID: ←

Project Name: ←

Grantee Number: ←

IDIS Activity Number: ←

Click on [Search](#) This option will take you to this screen.

The screenshot shows the 'Projects' page in the Certification Portal. The search results table is as follows:

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 you to this screen.

The screenshot shows the 'Project: 00-18 - WINTER SOLSTICE » General Information' page. The address is 754 Icicle Way, SPIRIT LAKE, IA 51360-0000. Below the address, there are three summary cards:

- Electronic Documents:** 0
- Annual Owner Cert:** Not Submitted
- Buildings:** 2

Projects



Option 5: Click on



This will take you to your list of assigned projects.

Projects

Showing 1 - 1 of 1 records

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

Results for: Project ID: 00-18 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	@

End Section 2

SECTION 3

MANUAL ENTRY NEW MOVE IN

Select the project you will be working in. Click [Proceed to Buildings](#)

Projects
Showing 1 - 1 of 1 records

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

Select the building you are working in. Click on [Change Report Period](#)

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
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 year.

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 you 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		—

For General Head of Household information - at minimum fields noted with a * must be completed.

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:

[Save](#) [Save & Close](#) [Cancel](#)

Enter Member (HOH) Name, Birth Date, Social Security Number (last four digits).
 Ethnicity, Race, Disabled, Gender (sex), etc. are all optional and not required to be answered.

Head of Household Information

*Member Name: Social Security Number:

*Birth Date: Age: Occupation:

Sex: Marital Status:



Ethnicity: Race:



Special Population: Disabled:

For additional Household Data -at minimum fields noted with a * must be completed.


Enter Move-in Date, New Cert Date, Unit Assistance Type, Owner's Designation and Restriction. Check Non-Qualified Student, if applicable, and if household has students that do not meet any exceptions (HOME and/or LIHTC). Initial Certification box 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: With a new move in, the Move-in Date and New Cert Date should be the same.


Household Data


*Move-In Date:  


*New Cert Date:  

Initial Certification:

Ready to Submit: 

Household Annual Income: 

Non Qualified Students: 

Family Size: 

*Unit Assistance Type:

Owner's Designation: LIHTC

Restriction: 30/50 (HOME - VLI)


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

Contact Information

Home Phone: - - Work Phone: - -

Email:


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

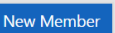

- ▶ Household Members
- ▶ Income
- ▶ Assets

HOME ONLY projects are not required to enter detailed data, therefore these 3 links/sections may not be available.

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

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

Click **New Member**

New Household Member

Adding a new household member to the system.

Household Member (Basic Data)

*Member Name:	<input type="text"/>	Social Security Number:	<input type="text"/>
*Birth Date:	<input type="text"/>	Age:	<input type="text"/>
*Relation:	<input type="text"/>	Occupation:	<input type="text"/>

Household Member (Demographics)

Sex:	<input type="text"/>	Marital Status:	<input type="text"/>
Ethnicity:	<input type="text"/>	Race:	<input type="text"/>
Special Population:	<input type="text"/>	Disabled:	<input type="checkbox"/>

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

Enter Member Name, Birth Date, Relation and Social Security Number (last four digits).

New Household Member

Adding a new household member to the system.

Household Member (Basic Data)

*Member Name:	<input type="text"/>	Social Security Number:	<input type="text"/>
*Birth Date:	<input type="text"/>	Age:	<input type="text"/>
*Relation:	<input type="text"/>	Occupation:	<input type="text"/>

Ethnicity, Race, Disabled, Gender (sex), etc. are all optional and not required to be answered.

Household Member (Demographics)

Sex:	<input type="text"/>	Marital Status:	<input type="text"/>
Ethnicity:	<input type="text"/>	Race:	<input type="text"/>
Special Population:	<input type="text"/>	Disabled:	<input type="checkbox"/>

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

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

Unit: 09, Tenant: Test » Income

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

New Income **Close**

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

Annual Income: **\$0.00**

Annual Asset Income: **\$0.00**

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

Click **New Income** to enter household income by Member Name. All boxes with down arrows have drop down selections. Income Source and Amount section must be completed although not asterisked *.

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 Income. 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**

You can enter income listed on the TIC form in the tenant file or click on calculate **Calculate** to have system calculate each earned income. Enter Pay Rate, Frequency, Hours per Year, and the system will calculate Annual Income. For each income to calculate, 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, the Income Verification section is not required to be entered. However, if the property would like to use this feature, complete the Verification Source and Verification Date as applicable.

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 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 Income](#) [Close](#)

<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**

Click [Save](#) when done with the page or [Save & New](#) to add additional incomes or [Save & Close](#) when ready to move to next unit.

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

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
				\$16,545.00	

Annual Income: **\$16,839.96**

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

Click on [New Asset](#) to enter household asset data by Member Name. Fields with down arrows have drop down selections. **At minimum, fields noted with a * 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:

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 & Cash 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: 

Annual Asset Income: 

The Asset Verification section includes Verification Source and Verification Date. The Asset Verification section is not required to be entered. However, if the property would like to use this feature, complete the Verification Source and Verification Date as applicable.

Asset Verification

Verification Source: 

Verification Date: 

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

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

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 has been entered in all screens in the unit, click **Save & Close** to return to Unit screen.

Rent Change Date:

****DO NOT**** enter a Rent Change Date except in cases where a significant increase or decrease in rent has occurred at a time other than recertification that changes the tenant paid portion (TPP), i.e. new subsidy added, subsidy removed, utility allowance changed, etc.

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

Mandatory Charges: These are non-optional/mandatory fees that the tenant must pay as a condition of occupancy (garage rental, renter's insurance, etc.).

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

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

Gross Rent: If Tax Credit only it will include Tenant Paid, Mandatory Charges, and Utility Allowance. If HOME/TC/NHTF or HOME or NHTF only it will include all fields.

End Section 3

SECTION 4

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 Agency Covenant units), full recertifications are required on the lower targeted units throughout the life of the project. For HOME or NHTF, full recertifications are required every 6th year of the Affordability Period.

Select the project and [Proceed to Buildings](#)

The screenshot shows the 'Projects' page in the Certification Portal. The top navigation bar includes 'Certification Portal', 'Your Entity Name', and several menu items: 'Projects', 'Templates', and 'On-Site Managers'. A red arrow points to the 'Proceed to Buildings' button in the top right of the navigation bar. Below the navigation bar, the 'Projects' section shows a table with columns: Project ID, Project Name, Annual Owner Certification (Status, Last Submission Date), Buildings, and Contact Us. The first row is highlighted with a magnifying glass icon and contains the following data:

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

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

The screenshot shows the 'Buildings' page for Project 00-18 - WINTER SOLSTICE. The top navigation bar includes 'Project: 00-18 - WINTER SOLSTICE » Buildings' and the address '754 Icicle Way, SPIRIT LAKE, IA 51360-0000'. A red arrow points to the 'Proceed to Units' button in the top right of the navigation bar. Below the navigation bar, the 'Buildings (2)' section shows a table with columns: 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, and Units. The first two rows are highlighted with magnifying glass icons and contain the following data:

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](#)

The screenshot shows the 'Units' page for Building ID IA-00-18001. The top navigation bar includes 'Building ID: IA-00-18001 » Units' and the project name 'Project: 00-18 - WINTER SOLSTICE'. A red arrow points to the 'New Tenant Cert' button in the top right of the navigation bar. Below the navigation bar, the 'Units' section shows a table with columns: Unit ID, No. of Bedrooms, Square Footage, Status, Head of Household, SSN, Last Certification Date, Re-Certification Due Date, and Ready to Submit. The first two rows are highlighted with magnifying glass icons and contain the following data:

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		—

General Information 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

General Information 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

Income

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

Annual Income: \$16,839.96

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

Income » Seb., C. - Head of Household

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

Edit

Close

Member Information

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

Relation: **Head of Household**

Income Source & Amount


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

Annual Income: **\$12,852.00**

Income Verification

Verification Source: **Not Verified**

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

Click  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**

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:

Income Verification

Verification Source:

Verification Date:

Save & Close

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

Income

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**

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

Tenant Certification Form

- IFA **does not** accept the CP system generated TIC form for file reviews. IFA has a required TIC form that can be found on the IFA website.

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:

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**

Miscellaneous  

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

Document Templates 


Miscellaneous  

Showing 1 - 2 of 2 records

<input type="checkbox"/>	Template Name	Original Template Name	Uploaded By	Uploaded On
<input type="checkbox"/>	Owner Cert	a. 2018 Owner Certification.docx	Admin IFA	07/12/2019
<input type="checkbox"/>	Exhibit E - Utility Allowance	g. Exhibit E -Utility Information Form.docx	Admin IFA	07/12/2019

Income & Rent Test

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

Unit ID: 10 » Household Income & Rent Limit Status 

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

Household Information

Unit ID: **10**

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



Family Size: **1**

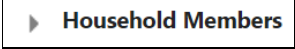

No. of Bedrooms: **2**


Household Income: **\$16,859.42**

Gross Rent: **\$550.00**

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



Click  if there have been any changes to the members. If a member (other than HOH) moved out during the year, click on the household member that you would like to remove. Once the tenant is selected, at the bottom of the page,  **1 household member selected** will appear. Click on the delete button to remove the household member. If the household member that you would like to delete is tied to one or more incomes, the income for that person must be deleted first.

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

General Information | **Household Members** | Income | Assets | 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

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, if you identify an entry error, select 
NOTE: Move in dates can only be corrected by using Delete Tenant Cert.

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:

Edit any field applicable and 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

Edit Close Tenant Certification Form Income & Rent Test

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: **12/22/2018** Household Annual Income: **\$0.00** *Unit Assistance Type:

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

Save Save & Close Cancel

Delete Tenant Certs

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

137.117.99.11 says

Are you sure you want to delete the selected Item?

OK Cancel

End Section 4

SECTION 5

MANUAL UNIT TRANSFER

1. Within Same Building (If only one building or 8609 8b election, when project has multiple buildings and owner elected to treat buildings as single buildings)
2. Between Buildings (Multiple Building Project 8609 8b Election Only)

Part II First-Year Certification—Completed by Building Owners with respect to the First Year of the Credit Period	
7 Eligible basis of building (see instructions)	7
8a Original qualified basis of the building at close of first year of credit period	8a
b Are you treating this building as part of a multiple building project for purposes of section 42 (see instructions)?	<input type="checkbox"/> Yes <input type="checkbox"/> No

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](#)

The screenshot shows the 'Projects' page with a table of project records. A red arrow points to the 'Proceed to Buildings' button in the top navigation bar.

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

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

The screenshot shows the 'Buildings' page for project 00-18. A red arrow points to the 'Proceed to Units' button in the top navigation bar.

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 **Building ID: IA-00-18001 » Units**

Project: 00-18 - WINTER SOLSTICE

Change Report Period: **New Unit** | **Unit Definition** | **Income & Rent Test** | **New Tenant Cert** | **Delete Tenant Certs** | **Move Out** | **Unit Transfer** | **Ready All Units** | Close

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

Unit ID: 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:

At the bottom of the page, click **Transfer** to complete the action.

TRANSFER BETWEEN BUILDINGS — Based on 8609 8b election marked “Yes”.

Select the project and click on

Proceed to Buildings

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 and click

Proceed to Units

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

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

Building ID	Placed In Service Date	Last Report Date	Current Reporting Period	IRS Compliance Status	HOME Compliance Status	Agency Compliance Status	Tenant Recert Status	Last Submission Date	Units
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

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: 10 » Unit Transfer

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

Unit Transfer Data

Current Unit: **10**

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

New Building ID: - -

*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

Click the at the end of the Building ID New Building ID: - - to show available buildings and select the building the transfer-to is occurring.

Showing 1 - 2 of 2 records



Building ID	Address	Project ID
IA-00-18001	2300 Sunner Avenue	00-18
IA-00-18002	2302 Sunner Avenue	00-18

Click the down arrow in *New Unit: ▼ 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 SECTION 5

SECTION 6

MANUAL MOVE OUT

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

certificationportal 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 and click **Proceed to Units**

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

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

Building ID	Placed In Service Date	Last Report Date	Current Reporting Period	IRS Compliance Status	HOME Compliance Status	Agency Compliance Status	Tenant Recert Status	Last Submission Date	Units
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**

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

End Section 6

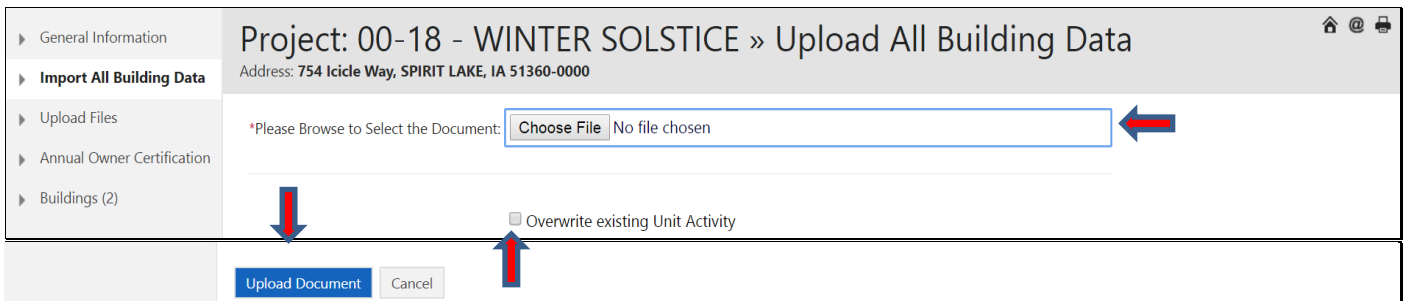
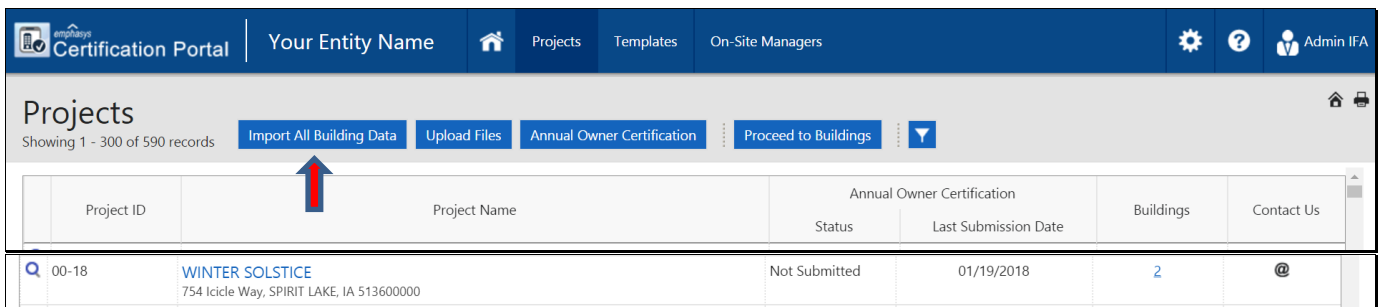
SECTION 7

3RD PARTY SOFTWARE TENANT DATA IMPORT

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

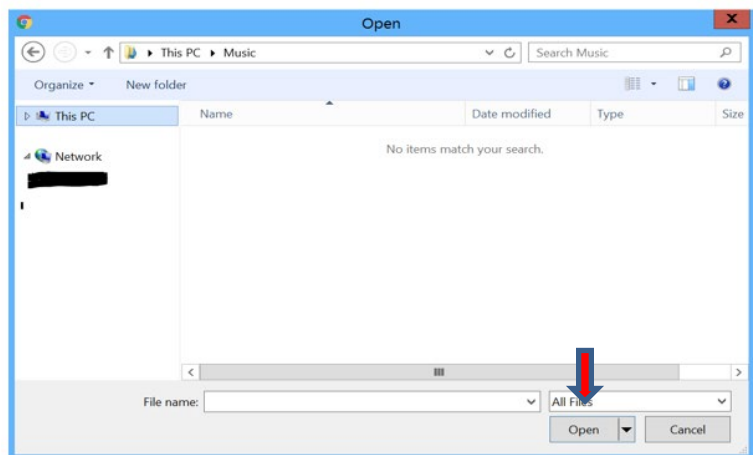
UPLOADING ALL BUILDING XML FILE

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



Click on Choose File

Select the XML file created by the 3rd party software (typically found on the C: drive).



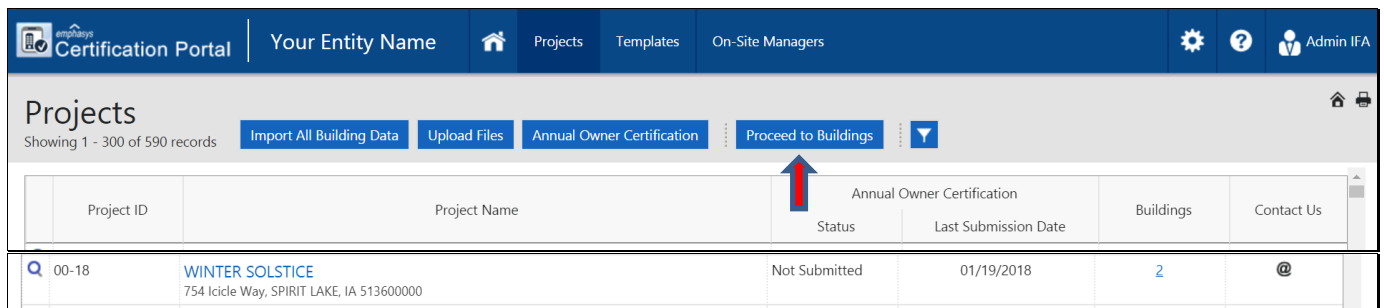
Select the XML file, click and click to complete the process. Documents can be imported multiple times for the same project as needed, due to errors. After the initial import, for any subsequent imports, you must check the box. Overwrite existing Unit Activity

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

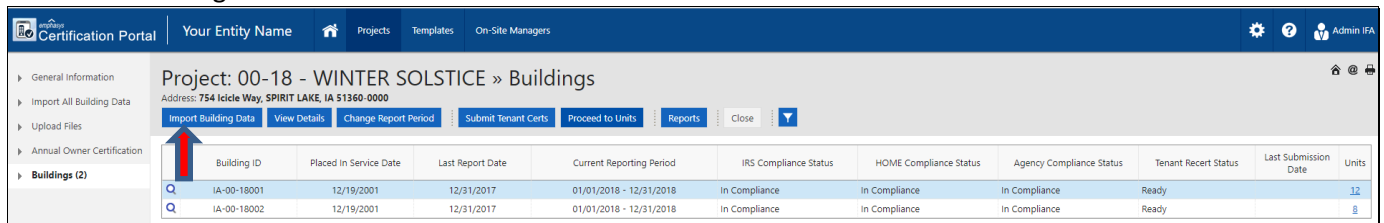
IMPORTING SINGLE BUILDING(S) – Even if multiple buildings are in the project.

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

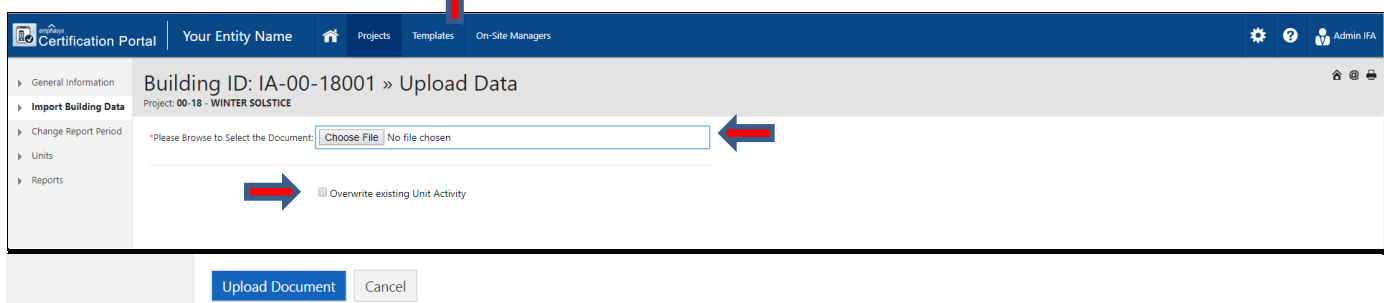
Highlight the project and click



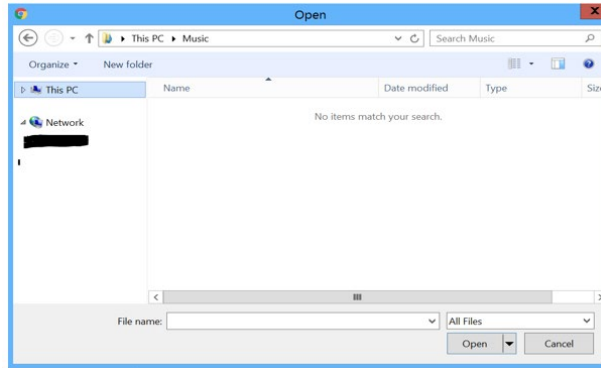
Select the building that matches the XML file and click



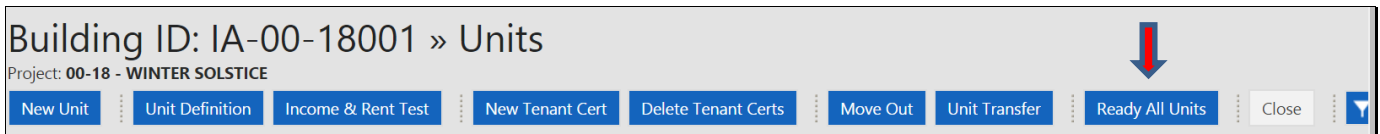
*Please Browse to Select the Document: No file chosen



Select the XML file and click and then click at the bottom of the Upload screen to complete the process. This must be done for all buildings.



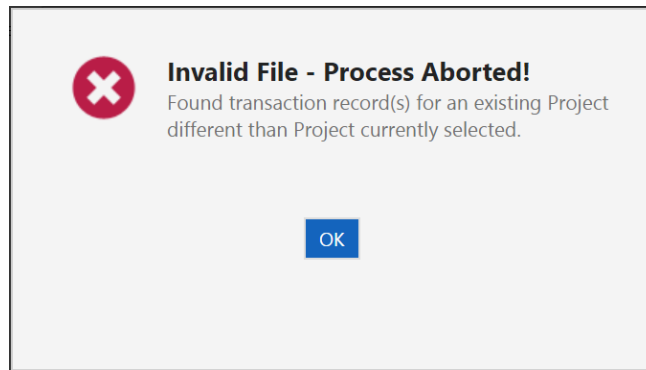
Continue this process until all buildings have been uploaded.



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. For any subsequent uploads, 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 an error message, provide a copy of the Error Log and XML file via email to the assigned IFA 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.

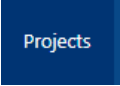
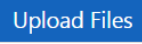
END SECTION 7

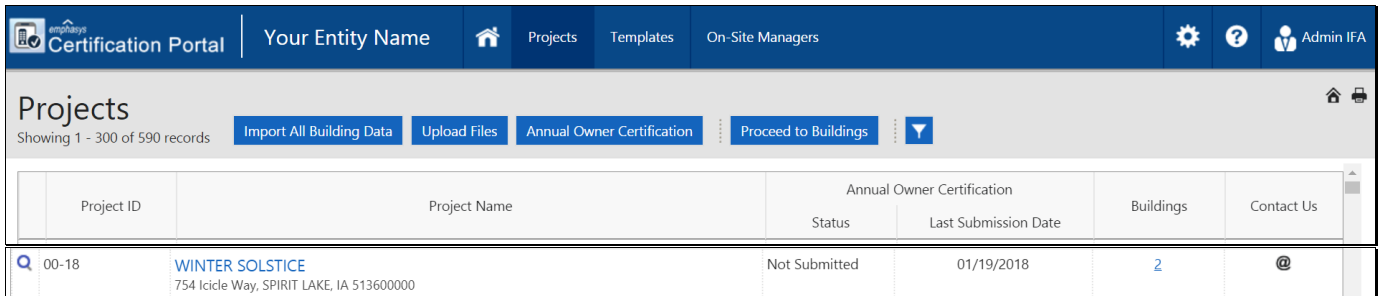
SECTION 8

Document Upload (tenant files, inspection responses, annual reporting, etc.)

UPLOADING FILE DOCUMENTS

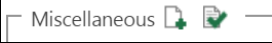
NOTE: This is different from the Upload Document above

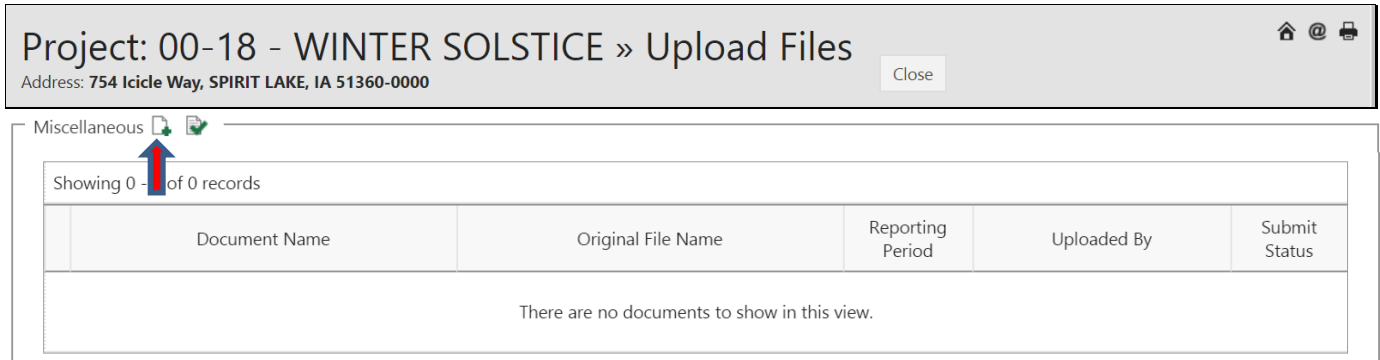
Click on  to access Projects list. Select the project and click 




The screenshot shows the 'Projects' page in the Certification Portal. The top navigation bar includes 'Your Entity Name', 'Projects', 'Templates', and 'On-Site Managers'. Below the navigation, there are buttons for 'Import All Building Data', 'Upload Files', 'Annual Owner Certification', and 'Proceed to Buildings'. A table lists projects with columns for Project ID, Project Name, Annual Owner Certification Status, Last Submission Date, Buildings, and Contact Us. The first row shows Project ID '00-18', Project Name 'WINTER SOLSTICE', Status 'Not Submitted', Last Submission Date '01/19/2018', and 2 Buildings.

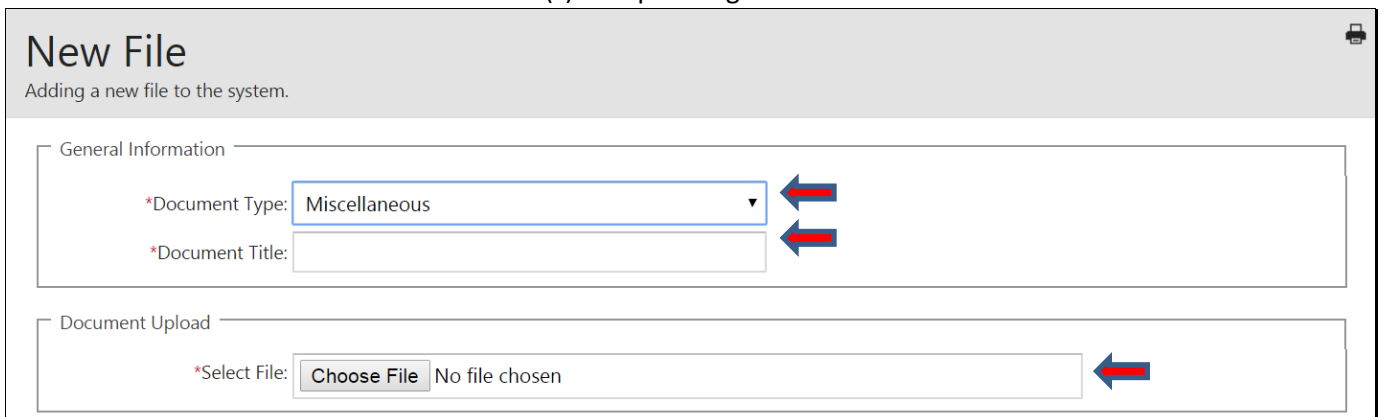
Project ID	Project Name	Annual Owner Certification Status	Last Submission Date	Buildings	Contact Us
00-18	WINTER SOLSTICE 754 Icicle Way, SPIRIT LAKE, IA 513600000	Not Submitted	01/19/2018	2	@

Scroll to the bottom 



The screenshot shows the 'Project: 00-18 - WINTER SOLSTICE » Upload Files' page. The address is '754 Icicle Way, SPIRIT LAKE, IA 51360-0000'. Below the header, there is a 'Miscellaneous' icon and a table with columns: Document Name, Original File Name, Reporting Period, Uploaded By, and Submit Status. The table is empty, showing 'Showing 0 - 1 of 0 records' and the message 'There are no documents to show in this view.' A red arrow points to the 'Miscellaneous' icon.

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



The screenshot shows the 'New File' upload form. It has a 'General Information' section with a dropdown menu for '*Document Type:' set to 'Miscellaneous' and an empty text field for '*Document Title:'. Below is a 'Document Upload' section with a 'Choose File' button and the text 'No file chosen'. Red arrows point to the 'Miscellaneous' dropdown, the 'Document Title' field, and the 'Choose File' button.

*Document Type:

Document Type will always be Miscellaneous

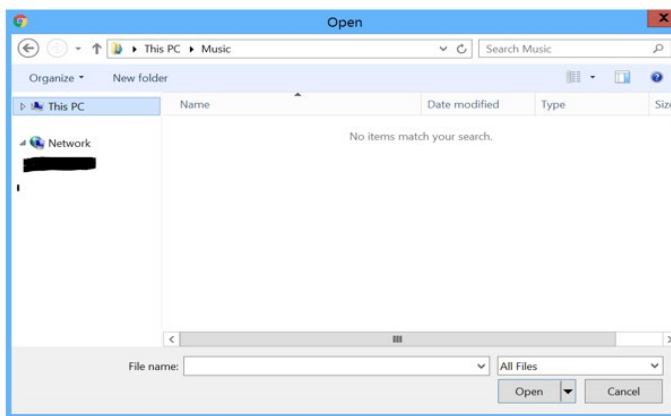
*Document Title:

100 Smith

Document Title should clearly identify upload example: Tenant file = Unit

Document Upload

*Select File: No file chosen



Select File: It is best to zip the documents and upload as one file (not individual files for each unit).

NOTE: If you are unable to locate the file on the computer, 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 Section 8

SECTION 9

ANNUAL CERTIFICATION

Annual Owner Certification

IFA **does not review or accept** the CP system-generated Owner Certification documents. The system requires it to be submitted, to allow submission of the tenant data for each building(s). IFA has a required Owner Certification form with Exhibits which is provided annually via email and can be found on the IFA website.

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

SECTION 10

REVIEWING DATA AND SUBMITTING TO IFA

IFA highly recommends the owner/management agent review all data entry prior to submitting.

REVIEWING UNIT DATA AND READYING UNITS FOR SUBMISSION.

Reports

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

Building ID: IA-00-01002 » Reports

Project: 00-01 - Meadow Crest Gardens I

Close

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, Excel, or PDF.

LIHTC/HOME Annual Occupancy

Include units without recent activity

Run Report for all Buildings

Show only last 4 digits of SSN in reports

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.

Generated on 7/23/2019 by Admin 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
Project: 00-18 WINTER SOLSTICE, Project Address: 754 Icicle Way																				
Building: IA-00-18001, Total Number of Units: 12																				
09	843	2	08/01/2011	10/10/2018	###-###-1111	Rees, Nancy	12/01/2017		N	70	\$11,370.96						1	N		N
09	843	2	12/01/2018	11/01/2008	###-###-1111	Sebastian, Connie	12/01/2017		N	65	\$16,859.42	\$500.00		\$0.00	\$0.00	\$50.00	1	N		N
09	843	2	12/01/2018	12/10/2018	###-###-1111	Sebastian, Connie	12/02/2018		N	66	\$16,859.42	\$500.00	\$0.00	\$0.00	\$0.00	\$50.00	1	N		N
10	843	2	07/12/2013	12/01/2018	###-###-1111	Sebastian, Connie	12/01/2017		N	65	\$16,859.42						1	N		N
10	843	2	12/10/2018		###-###-1111	Sebastian, Connie	12/02/2018		N	66	\$16,859.42	\$500.00	\$0.00	\$0.00	\$0.00	\$50.00	1	N		N
11	843	2	06/01/2017		###-###-1111	Kain, Janice	12/01/2017		N	73	\$19,622.48						1	N		N
12	843	2	10/01/2014		###-###-1111	Jimenez, John	12/01/2017		N	85	\$16,624.31						1	N		N

Page 1 of 1


 **Household Income & Rent Limits Status**

Detail Report														
Your Entity Name													Generated on 7/23/2019 by Admin IFA Page 1 of 1	
Household Income & Rent Limits Status Report														
Unit ID	Bed Size	Head of Household Full Name	Household Size	Move-In Date	Last Certification Date	Last Rent Change Date	Total Annual Household Income	Income Limit	Effective Date	Income Limit Status	Monthly Gross Rent	Rent Limit	Effective Date	Rent Limit Status
Project: 00-18 WINTER SOLSTICE, Project Address: 754 Icicle Way														
Building: IA-00-18001, County: Dickinson														
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	10/10/2014	12/01/2017		\$16,624.31	\$0		Below Income Limit	\$0.00	\$0	04/14/2017	Below Rent Limit

Once the data has been reviewed there are two ways to make a unit *Ready to Submit*.

General Information **Building ID: IA-00-18001 » Units**

Project: 00-18 - WINTER SOLSTICE



At the **BUILDING** level screen:

Click This allows the building to be submitted to the agency. When using 3rd party uploads, this is the preferred method to ready the units. Manual entries can also use this process by waiting until they have entered all unit data for the building(s).

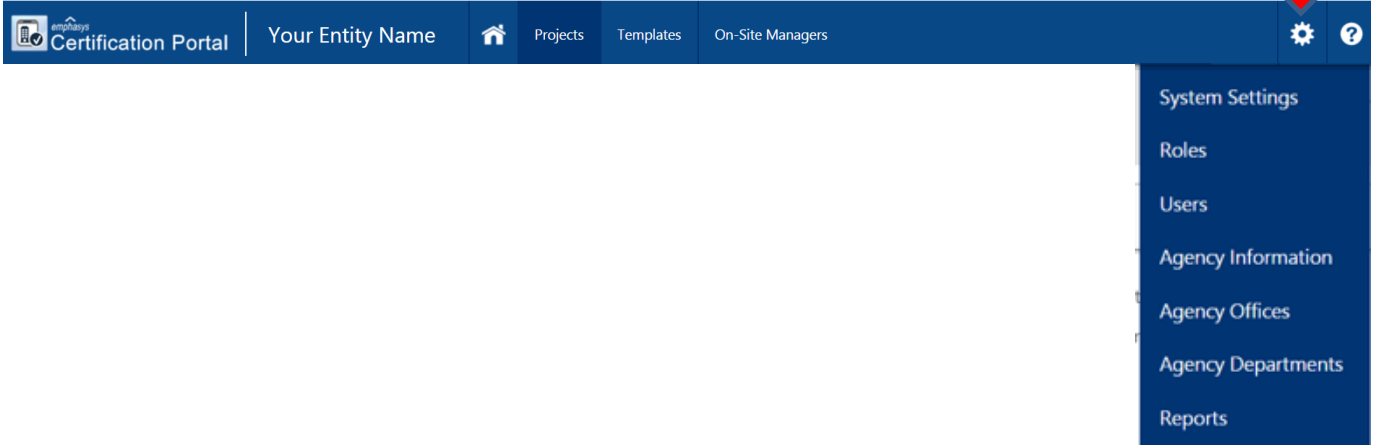
Ready to Submit	Ready to Submit
—	✓
—	✓
—	✓
—	✓
—	✓
—	✓
—	✓
—	✓
—	✓
—	✓

Or you can *Ready the Unit* each unit at the **UNIT** level screen. Select Ready to Submit: while in unit's General Information screen. Click Save after checking box.

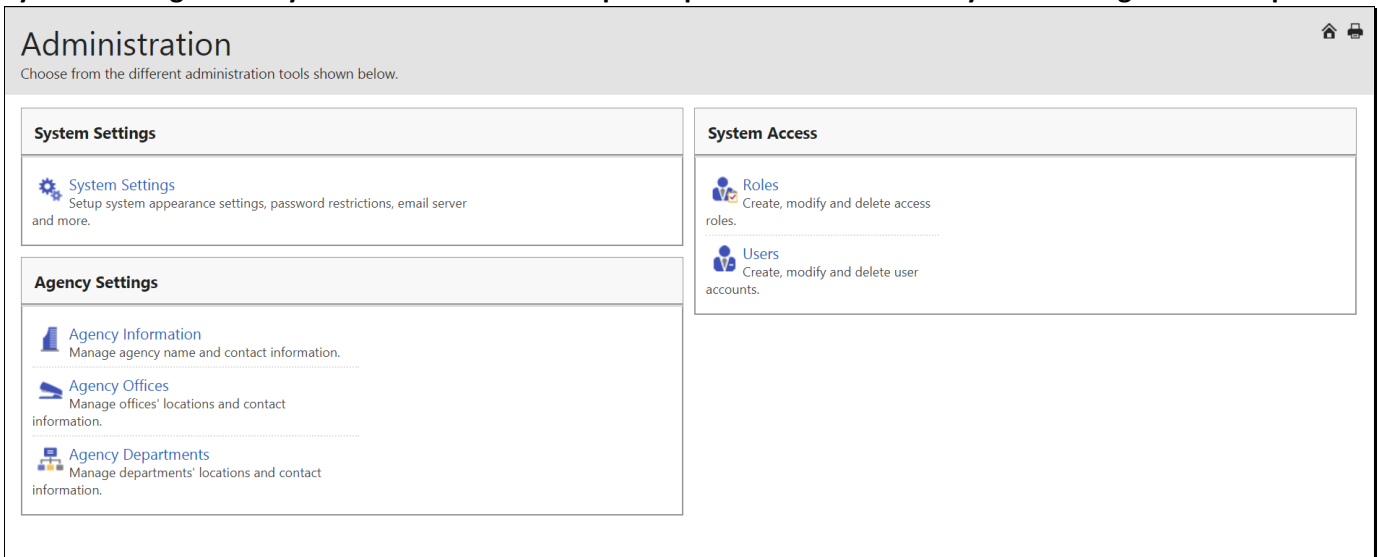
SECTION 11

MANAGEMENT CONTROLS (SUPER USER)

UPPER MANAGEMENT CONTROLS (not typically on-site personnel)



System Settings Security Tab will be used to set up user parameters. All other System Settings tabs are optional.



System Settings

- System Settings
- Roles
- Users
- Agency Information
- Agency Offices
- Agency Departments
- Reports

System Settings

Setup system appearance settings, password restrictions, email server and more.

Edit Close

- Security
- History
- Email Server
- Other

Account Lockout

Passwords Expiration

Passwords History

Account Inactivation

Passwords Security

- Passwords must contain at least 5 characters
- Passwords must contain at least one letter
- Passwords must contain at least one lower case letter
- Passwords must contain at least one upper case letter
- Passwords must contain at least one number

Click **Edit**

System Settings

Setup system appearance settings, password restrictions, email server and more.

Security History Email Server Other

Account Lockout

- Do not lockout
- Lockout after invalid login attempts

Lockout account for minute(s)

Account Inactivation

- Do not inactivate
- Inactivate after days without logging in

Passwords Expiration

- Passwords never expire
- Passwords expire every days

Show warning day(s) before passwords expire

Passwords Security

- Passwords must contain at least characters
- Passwords must contain at least one letter
- Passwords must contain at least one lower case letter
- Passwords must contain at least one upper case letter
- Passwords must contain at least one number

Passwords History

- Do not keep history

Save Save & Close Cancel

System Settings

Setup system appearance settings, password restrictions, email server and more.

Security History Email Server Other

Activity Log (Data changes and deletions)

Days to keep in history: **90**

Error Log (System errors)

Days to keep in history: **90**

Security Log (Logins, logouts, invalid login attempts, account lockouts & inactivations)

Days to keep in history: **90**

Click **Edit**

System Settings

Setup system appearance settings, password restrictions, email server and more.

Security | **History** | Email Server | Other

Activity Log (Data changes and deletions)
Days to keep in history:

Error Log (System errors)
Days to keep in history:

Security Log (Logins, logouts, invalid login attempts, account lockouts & inactivations)
Days to keep in history:

Save **Save & Close** Cancel

System Settings

Setup system appearance settings, password restrictions, email server and more.

Security | History | **Email Server** | Other

Connection Settings
Server Name:
Port:
From Address:
User Name:
Password:

Error Message Settings
Error Message Title:
Error Message:

Save **Save & Close** Cancel

System Settings

Setup system appearance settings, password restrictions, email server and more.

Security | History | Email Server | **Other**

Import Settings
Import Path:

Export Settings
Export Path:

Save **Save & Close** Cancel

Roles

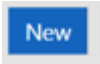
Setting up Roles to assign to individuals.

Roles only need to be set up one time and you can set up as many distinct roles as needed.

System Settings | **Roles** | Showing 1 - 4 of 4 records | **New** | Close | Filter | Refresh | Print

Role Name
Financial Auditor
Manager
On-Site Manager
Owner

System Settings | Roles | Users | Agency Information | Agency Offices | Agency Departments | Reports



Click

New Role
Adding a new role to the system.

General | Menu Access | Report Access | Administration Access

General Information

*Role Name: ←

Description:

Save Save & New Save & Close Cancel

Assign the Role by clicking the boxes for specific menu access and various access levels within CP.

New Role
Adding a new role to the system.

General | Menu Access | Report Access | Administration Access

Menu Rights Assignment

Assign	Section	Page Actions
<input type="checkbox"/>	Home	
<input type="checkbox"/>	Projects	<input type="checkbox"/> View <input type="checkbox"/> Upload Files <input type="checkbox"/> Annual Owner Certification <input type="checkbox"/> Change Requests
<input type="checkbox"/>	Templates	<input type="checkbox"/> New <input type="checkbox"/> View <input type="checkbox"/> Delete
<input type="checkbox"/>	On-Site Managers	
<input type="checkbox"/>	Manage On-Site Managers	<input type="checkbox"/> New <input type="checkbox"/> View <input type="checkbox"/> Edit <input type="checkbox"/> Delete
<input type="checkbox"/>	Project Assignment	

Select specific rights to the Role.

Role » Manager
Existing role configuration. Close

General | Menu Access | Report Access | Administration Access

Menu Rights Assignment

Assign	Section	Page Actions
<input checked="" type="checkbox"/>	Home	
<input checked="" type="checkbox"/>	Projects	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Upload Files <input checked="" type="checkbox"/> Annual Owner Certification <input type="checkbox"/> Change Requests
<input checked="" type="checkbox"/>	Templates	<input checked="" type="checkbox"/> New <input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Delete
<input checked="" type="checkbox"/>	On-Site Managers	
<input checked="" type="checkbox"/>	Manage On-Site Managers	<input checked="" type="checkbox"/> New <input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete
<input checked="" type="checkbox"/>	Project Assignment	

Save Save & New Save & Close Cancel

Set up Report Access for the Role.

Role » Manager
Existing role configuration. Close

General | Menu Access | **Report Access** | Administration Access

Report Rights

Assign	Report
<input type="checkbox"/>	Error Log
<input type="checkbox"/>	Role Access
<input type="checkbox"/>	Security Log
<input type="checkbox"/>	User Access

Assign rights by clicking each report.

New Role
Adding a new role to the system.

General | Menu Access | **Report Access** | Administration Access

Report Rights

Assign	Report
<input checked="" type="checkbox"/>	Error Log
<input checked="" type="checkbox"/>	Role Access
<input checked="" type="checkbox"/>	Security Log
<input checked="" type="checkbox"/>	User Access

Save Save & New Save & Close Cancel

This Administrative Access tab is not available until a role is created. See 2nd example.

Role » Manager
Existing role configuration. Close

General | Menu Access | Report Access | **Administration Access**

Administration Rights

The box at the red arrow will not appear until a Role has been created.

New Role
Adding a new role to the system.

General | Menu Access | Report Access | **Administration Access**

Administration Rights

Save Save & New Save & Close Cancel

New Role

Adding a new role to the system.

General | Menu Access | Report Access | **Administration Access**

Administration Rights

Assign	Section	Page Actions
<input type="checkbox"/>	System Settings	<input type="checkbox"/> Save
<input type="checkbox"/>	Roles	<input type="checkbox"/> New <input type="checkbox"/> View <input type="checkbox"/> Edit <input type="checkbox"/> Copy <input type="checkbox"/> Delete
<input type="checkbox"/>	Users	<input type="checkbox"/> New <input type="checkbox"/> View <input type="checkbox"/> Edit <input type="checkbox"/> Delete
<input type="checkbox"/>	Agency Information	<input type="checkbox"/> Save
<input type="checkbox"/>	Agency Offices	<input type="checkbox"/> New <input type="checkbox"/> View <input type="checkbox"/> Edit <input type="checkbox"/> Delete
<input type="checkbox"/>	Agency Departments	<input type="checkbox"/> New <input type="checkbox"/> View <input type="checkbox"/> Edit <input type="checkbox"/> Delete

Users

System Settings | Roles | **Users** | Agency Information | Agency Offices

Showing 1 - 1 of 1 records

	Full Name	Login Name	Back-Office User ID	Email	Active	Locked
	Admin IFA Emphasys	Admin-IFA		admin@ifa.gov	<input checked="" type="checkbox"/>	—

Enter all data for each tab, as applicable.

New User

Adding a new user to the system.

General | Employment | Other

Profile Information

*First Name:

Middle Name:

*Last Name:

Gender:

Birth Date:

Account Access

*Access Role:

Account Status: Active Inactive

Activation Date:

Expiration Date:

Never becomes inactive

Contact Information

Work Phone:

Home Phone:

Mobile Phone:

Fax:

*Email:

Login Information

*User Name:

*Password:

User must change password at next logon

User cannot change password

Password never expires

Click to close screen, to create additional users, or to go back to main screen.

New User
 Adding a new user to the system.

General
Employment
Other

Profile Information

*First Name:

Middle Name:

*Last Name:

Gender:

Birth Date:

Account Access

*Access Role:

Account Status: Active Inactive

Activation Date:

Expiration Date:

Never becomes inactive

Contact Information

Work Phone:

Home Phone:

Mobile Phone:

Fax:

*Email:

Login Information

*User Name:

*Password:

User must change password at next logon

User cannot change password

Password never expires

Save
Save & New
Save & Close
Cancel

Adding Users

On-Site Managers

First, the Super User will add the On-Site Manager:

Manage On-Site Managers

Home

Projects

Templates

On-Site Managers

Admin

Snapshot

Projects Status & Search

Projects

Project ID:

Project Name:

Site Number:

Priority Number:

Click New

New On-Site Manager

Adding a new on-site manager to the system.

NOTE: The username and password fields require at least 6 characters and are case sensitive.

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Certification Portal | Emphasys Software
We build software so you can build communities

← On-Site Managers

Home | Manage On-Site Managers | Project Assignment | Projects | Templates | On-Site Managers | Admin | Help

New On-Site Manager

Adding a new on-site manager to the system.

General Information

*First Name:
 Middle Name:
 *Last Name:
 *Email:

Financial Manager Only:

Login Information

*User Name:
 *Password:

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

Once you have added in the On-Site Manager, go back into **Project Assignment** and update:

Project Assignment

Certification Portal | Emphasys Software
We build software so you can build communities

← On-Site Managers

Home | Manage On-Site Managers | **Project Assignment** | Projects | Templates | On-Site Managers | Admin | Help

On-Site Manager Project Assignment

Select On-Site Manager For Project Assignment

Project Assignment

Showing 601 - 683 of 683 records

Project ID	Project Name
PR-04036	The Park on Market 101 Darby Lane, Anderson, SC 296240000
PR-18037	Oneil Pointe 612 Oneil Court, Columbia, SC 29223
PR-06007	Mauldin Gardens 330 MILLER RD, Mauldin, SC 29662
PR-04019	Manning Gardens Apartments 214 ALFRED HENRY DR, Manning, SC 29102

Update Cancel