



HOUSING FINANCE TREASURY

CERTIFICATION PORTAL

HOW-TO GUIDE

January 2023

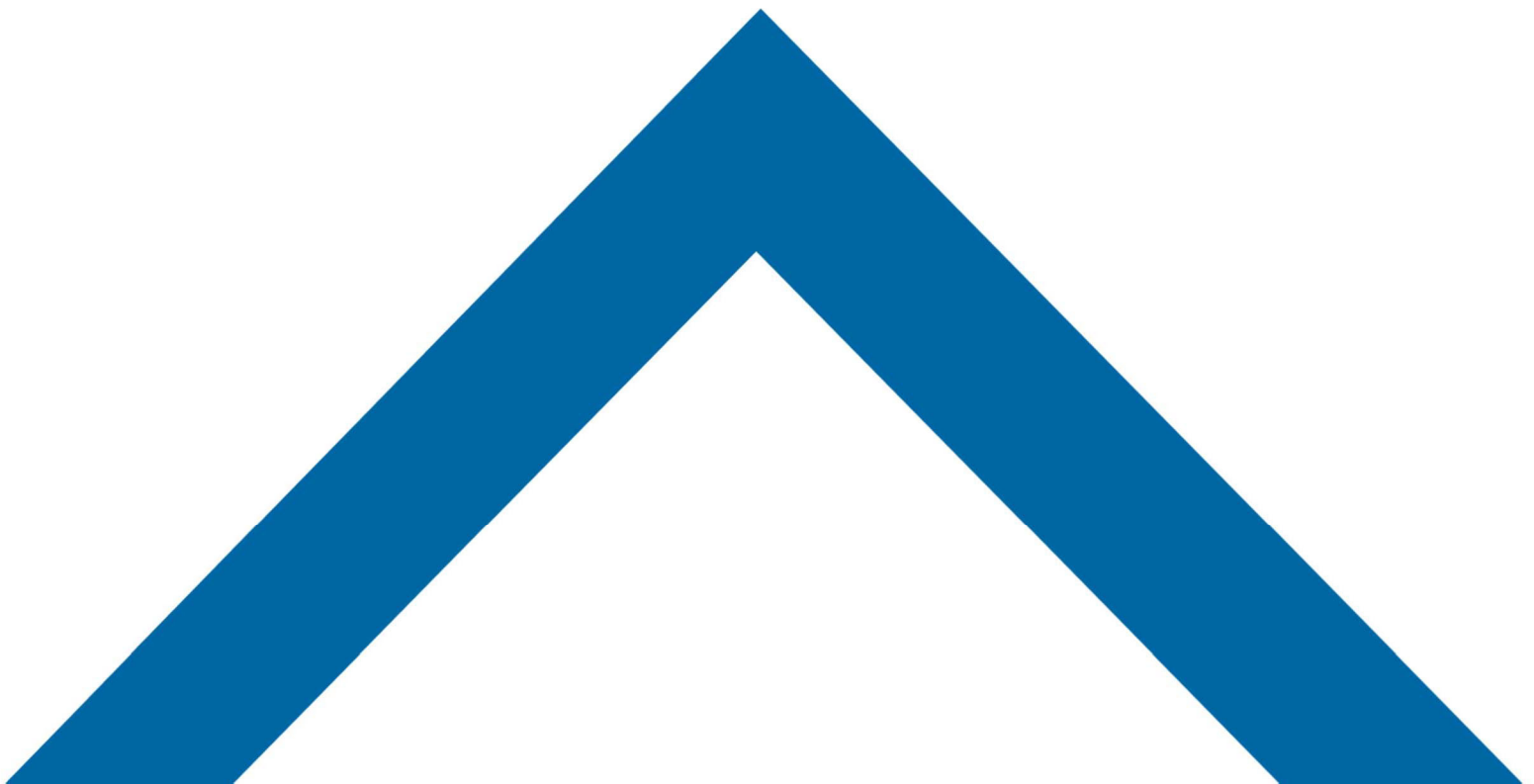




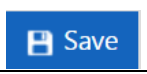



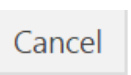









Table of Contents

SECTION 1	Logging in	Page 4
SECTION 2	Accessing Projects	Page 7
SECTION 3	Manual Entry - New Move In	Page 10
SECTION 4	Manual Entry - Recertification	Page 17
SECTION 5	Manual Entry – Transfer	Page 23
SECTION 6	Manual Entry – Move Out	Page 25
SECTION 7	Third Party XML Tenant Data Upload	Page 26
SECTION 8	Document Upload	Page 29
SECTION 9	Secure Management Controls	Page 30
SECTION 10	Reviewing Data and Submitting to Agency	Page 31
SECTION 11	Management Controls (Super User)	Page 32

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
	Print
	Notes
	Open E-Mail

SECTION 1

LOGGING IN

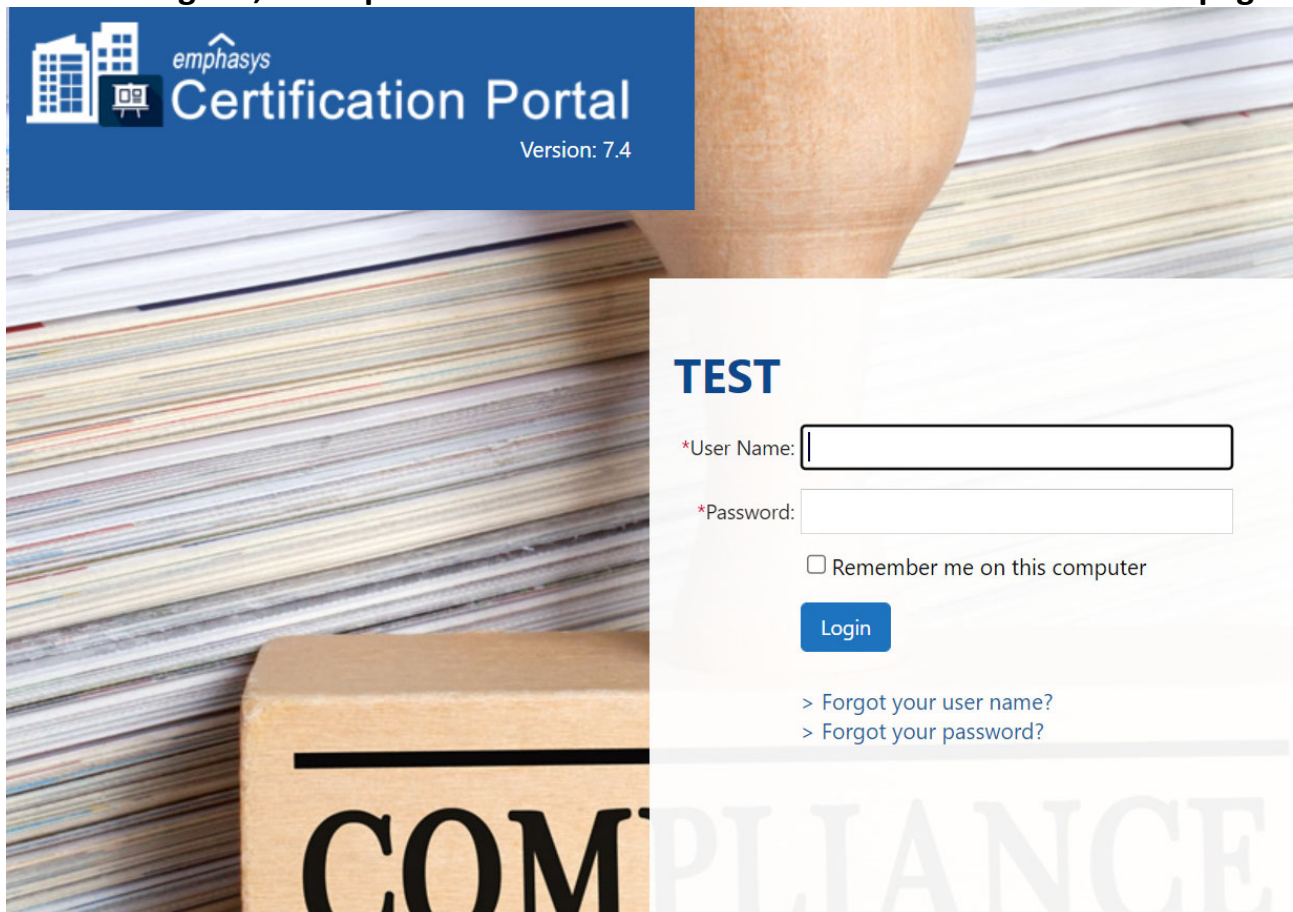
New (Super) User

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

New Non-Super User

If you are a new user (On-Site Manager), the Super User will set up your User ID, Password and assign specific projects to you. Contact your Super User for log in credentials.

- ✓ At initial sign in, enter provided User ID and Password at the SYSTEM LOGIN page.



emphasys
Certification Portal
Version: 7.4

TEST

*User Name:

*Password:

☐ Remember me on this computer

Login

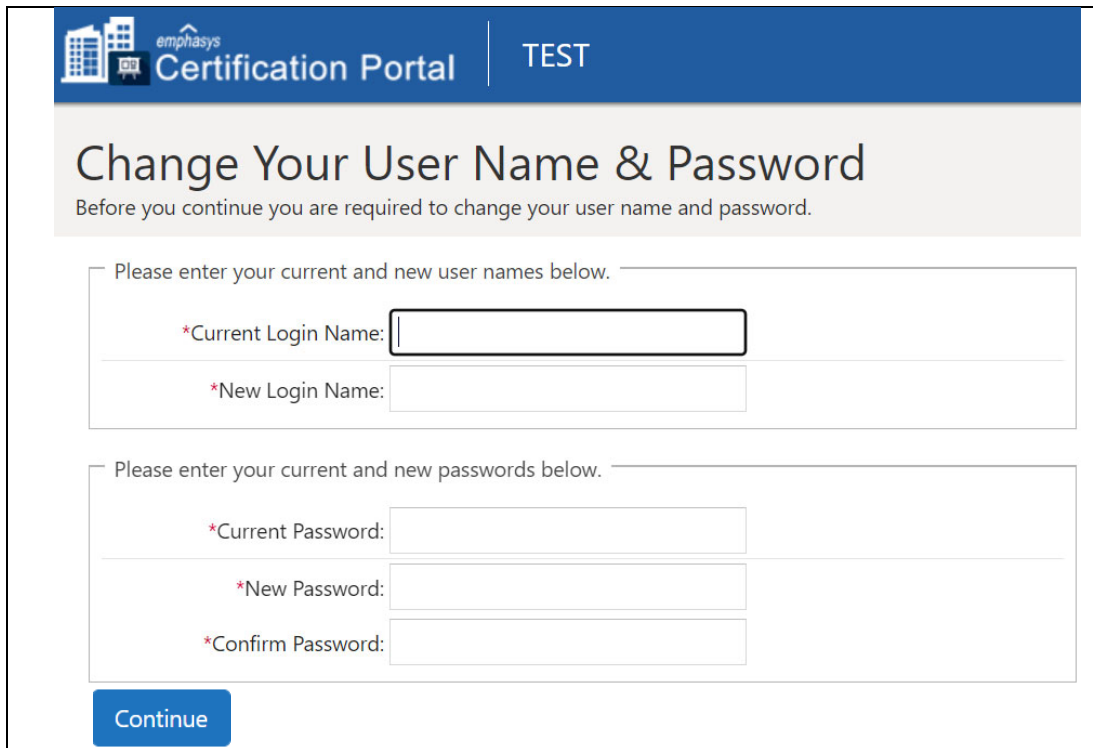
> [Forgot your user name?](#)

> [Forgot your password?](#)

ALL NEW USERS

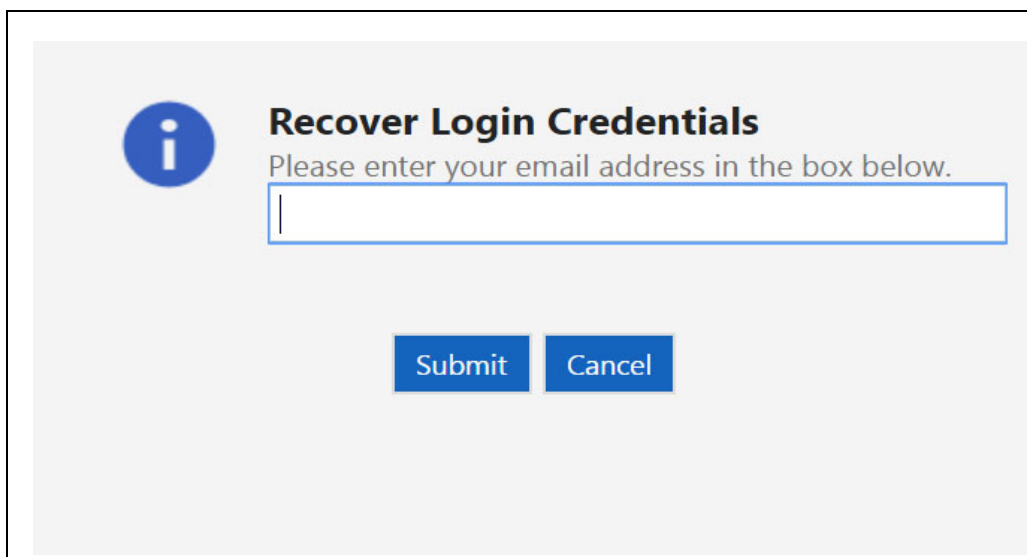
User will be required to create a new User ID and Password.

NOTE: Credentials could require specific characters and number of characters as set by the Super User.




The screenshot shows a web interface for the 'emphasys Certification Portal'. The header is blue with the portal logo and a 'TEST' link. The main heading is 'Change Your User Name & Password', followed by a subtext: 'Before you continue you are required to change your user name and password.' The form is divided into two sections. The first section, titled 'Please enter your current and new user names below.', contains two input fields: '*Current Login Name:' and '*New Login Name:'. The second section, titled 'Please enter your current and new passwords below.', contains three input fields: '*Current Password:', '*New Password:', and '*Confirm Password:'. A blue 'Continue' button is located at the bottom left of the form.

Existing Users can recover credentials by clicking [> Forgot your user name?](#) and enter e-mail address and click [Submit](#)









The screenshot shows a 'Recover Login Credentials' form. It features a blue information icon (i) on the left. The title is 'Recover Login Credentials', followed by the instruction: 'Please enter your email address in the box below.' Below this is a single input field for the email address. At the bottom, there are two blue buttons: 'Submit' and 'Cancel'.

Once new credentials are created and logged in, user will see the SNAPSHOT (Landing Page) to access Projects and Templates.


 Certification Portal

Emphasys HFA 2022 User Conference

 Projects Templates On-Site Managers    Emphasys Software

Snapshot  

Projects Status & Search

 Projects

Status

✓ 677 Projects

View All

Project ID:

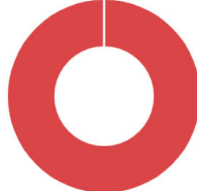
Project Name:

Grantee Number:

IDIS Activity Number:

Search

2022 Annual Owner Certifications Submission Status






0 Completed

0 Submitted

677 Not Submitted

Recently Viewed Projects


	FL-00021	Flagler Street Apartments	24 Buildings
	FL-51202	The Parker at Cone Phase II	4 Buildings
	FL-06056	Orchard Park Apartments	3 Buildings

Page 6

SECTION 2 ACCESSING PROJECTS

There are various options to access a project:

Projects Status & Search

 [Projects](#)

Status
✓ 590 Projects

[View All](#)

Project ID:


Project Name:

Grantee Number:


IDIS Activity Number:

[Search](#)

Option 1: Click on [View All](#) This will list all projects in the system.


Option 2: Click on [Projects](#)  This will list all projects in the system.

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



Certification Portal


Emphasys HFA 2022 User Conference





Projects

Templates

On-Site Managers





 Emphasys Software

Projects

Showing 1 - 50 of 677 records


Import All Building Data



Upload Files

Annual Owner Certification



Change Requests

Proceed to Buildings



Project ID	Project Name	2022 Annual Owner Certifications		Buildings	Contact Us
		Status	Last Submission Date		
 FL-51202	The Parker at Cone Phase II 3000 Cone Crest Ct., Greenville, SC 29601	Not Submitted	01/24/2022	4	@
 FL-96032	Simmons Cay Apartments 57 Simmonsville Road, Bluffton, SC 29910	Not Submitted	10/25/2021	6	@

Click  to search for a specific project. Enter Project Number or Project Name.

Projects Showing 1 - 50 of 677 records		Import All Building Data	Upload Files	Annual Owner Certification	Change Requests	Proceed to Buildings							
Project ID:	<input type="text"/>												
Project Name:	<input type="text"/>		Search										

Option 3: Enter Project ID and/or Project Name and/or Grantee Number 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:

Search

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

Projects					
Showing 1 - 1 of 1 records					
Import All Building Data Upload Files Annual Owner Certification Change Requests Proceed to Buildings					
Search Results for: Project ID: FL-00021 ✕ Clear All					
Project ID	Project Name	2022 Annual Owner Certifications		Buildings	Contact Us
		Status	Last Submission Date		
FL-00021	Flagler Street Apartments 669 Rutherford Road, Greenville, SC 29609	Not Submitted	02/01/2022	24	@

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

Snapshot

Projects Status & Search

Project ID:

Project Name:

Grantee Number:

IDIS Activity Number:

Search

2022 Annual Owner Certifications Submission Status


0 Completed

0 Submitted

677 Not Submitted

Recently Viewed Projects

FL-00021	Flagler Street Apartments	24 Buildings
FL-51202	The Parker at Cone Phase II	4 Buildings

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

Page 8

Emphasys HFA 2022 User Conference

Projects
Templates
On-Site Managers

Emphasys Software

General Information
Import All Building Data
Upload Files
Annual Owner Certification
Change Requests
Buildings (24)

Project: FL-00021 - Flagler Street Apartments » General Information

Address: 669 Rutherford Road, Greenville, SC 29609

669 Rutherford Road
Greenville, SC 29609

Electronic Documents
2
View

2022 Annual Owner Cert
Not Submitted
Last Submitted: 2/1/2022
View

Buildings
24
View

Option 5: Click

Projects



TEST

Projects
Templates
On-Site Managers

Emphasys Software

The user will see a list of projects that have been assigned them. The Super User sees all projects.

Projects

Showing 1 - 50 of 677 records

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

	Project ID	Project Name	2022 Annual Owner Certifications		Buildings	Contact Us
			Status	Last Submission Date		
	FL-51202	The Parker at Cone Phase II 3000 Cone Crest Ct., Greenville, SC 29601	Not Submitted	01/24/2022	4	@
	FL-96032	Simmons Cay Apartments 57 Simmonsville Road, Bluffton, SC 29910	Not Submitted	10/25/2021	6	@

SECTION 3

MANUAL ENTRY - NEW MOVE IN

Highlight the project to work in. Click **Proceed to Buildings**

Projects

Showing 1 - 50 of 677 records

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

Project ID	Project Name	2022 Annual Owner Certifications		Buildings	Contact Us
		Status	Last Submission Date		
FL-51202	The Parker at Cone Phase II 3000 Cone Crest Ct., Greenville, SC 29601	Not Submitted	01/24/2022	4	@

Highlight the building to work in. Click **Change Report Period**

- General Information
- Import All Building Data
- Upload Files
- Annual Owner Certification
- Change Requests
- Buildings (4)**

Project: FL-51202 - The Parker at Cone Phase II » Buildings

Address: 3000 Cone Crest Ct., Greenville, SC 29601

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
FL-14-42130	04/07/2014	07/31/2022	08/01/2022 - 08/31/2022	Out of Compliance	Out of Compliance	In Compliance	Not Ready	07/07/2022	24
FL-14-42131	04/24/2014	07/31/2022		Out of Compliance	Out of Compliance	In Compliance	Not Ready	07/07/2022	24

Enter the Reporting Period for the applicable period. To update the reporting period for all buildings in the project, check the box **Update All Buildings** and click **Save**

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

Building ID: FL-14-42130 » Change Report Period

Project: FL-51202 - The Parker at Cone Phase II

*New Reporting Period: 08/01/2022 - 08/31/2022

☐ Update All Buildings

Save
Cancel

Highlight the Building to work in and click **Proceed to Units**

- General Information
- Import All Building Data
- Upload Files
- Annual Owner Certification
- Change Requests
- Buildings (4)**

Project: FL-51202 - The Parker at Cone Phase II » Buildings

Address: 3000 Cone Crest Ct., Greenville, SC 29601

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
FL-14-42130	04/07/2014	07/31/2022	08/01/2022 - 08/31/2022	Out of Compliance	Out of Compliance	In Compliance	Not Ready	07/07/2022	24
FL-14-42131	04/24/2014	07/31/2022		Out of Compliance	Out of Compliance	In Compliance	Not Ready	07/07/2022	24

Highlight the unit for data input and click **New Tenant Cert**

Building ID: FL-14-42130 » Units

Project: FL-51202 - The Parker at Cone Phase II

	Unit ID	No. of Bedrooms	Square Footage	Status	Head of Household	SSN	Ready to Submit	Last Certification Date	Re-Certification Due Date
Q	4101	2	970	Occupied by Tenant	Wilson, Carolyn	###-##-1111	—	05/01/2022	
Q	4103	2	970	Occupied by Tenant	Sims, Irene	###-##-1111	—	05/01/2022	

Complete all system required fields (*) and any others required by the Agency.

Unit: 4101, Tenant: VACANT » General Information

Bed: 2 Sq Ft: 970 System Designation: Low Income Report Period: 08/01/2022 - 08/31/2022 Last Report Ending: 07/31/2022 Building: FL-14-42130 Project: FL-51202 - The Parker at Cone Phase II

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:
 Ready to Submit: ☐

Contact Information

Home Phone: Work Phone:
 Email:

Transfer Information

Transferred From Building:
 Old Unit ID: Old Unit Move-In:

Enter required (*) and all applicable data required by the Agency.

Head of Household Information

*Member Name: Social Security Number:
 *Birth Date: Age: Occupation:
 Sex: Marital Status:
 Ethnicity: Race:
 Special Population: Disabled: ☐

Enter required (*) and all applicable data. Check Non-Qualified Student if household has students that do not meet any exceptions (HOME and/or LIHTC). Initial Certification box will automatically check for all Initial Certifications. Family size and Household Annual Income will auto fill when family data is entered in detail mode or enter on this screen if in summary mode (MF controlled). Check box Ready to Submit when entry is complete.

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:
 Ready to Submit: ☐

<p>Check with your Agency for requirements to complete this lower information.</p> <p>Contact Information</p> <p>Home Phone: <input type="text"/> - <input type="text"/> - <input type="text"/> Work Phone: <input type="text"/> - <input type="text"/> - <input type="text"/></p> <p>Email: <input type="text"/></p>	<p>This information will auto fill when a transfer occurs.</p> <p>Transfer Information</p> <p>Transferred From Building:</p> <p>Old Unit ID: Old Unit Move-In:</p>
---	--

General Information

Unit: 4101, Tenant: VACANT » General Information

Bed 2	Sq Ft 970	System Designation Low Income	Report Period 08/01/2022 - 08/31/2022	Last Report Ending 07/31/2022	Building FL-14-42130	Project FL-51202 - The Parker at Cone Phase II
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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:

Initial Certification: ☒

Family Size:

Restriction:

Ready to Submit: ☐

Contact Information

Home Phone: - -

Work Phone:

Email:

Transfer Information

Transferred From Building:

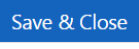
Old Unit ID:

Old Unit Move-In:

Save

Save & Close

Cancel

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

After clicking  and the project is set up in Detail Mode, a menu will open on left side of screen for entering additional household data.

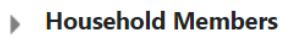
General Information

Household Members

Income

Assets

Unit Rent

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

Unit: 4101, Tenant: Lindy Sue » Household Members

Bed 2 Sq Ft 970 System Designation Low Income Report Period 08/01/2022 - 08/31/2022 Last Report Ending 07/31/2022 Building FL-14-42130 Project FL-51202 - The Parker at Cone Phase II

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** and complete all system required fields (*) and any others required by the Agency. Check with the Agency for other required fields.

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

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

Household Member (Basic Data)

*Member Name: Danny Sue Social Security Number: 000-00-1234

*Birth Date: 01/01/2020 Age: 2

*Relation: Child/Stepchild Occupation:

Household Member (Demographics)

Sex: Male Marital Status: Single

Ethnicity: Tenant Declined to Respond Race: Chooses not to Disclose

Special Population: Developmental Disabled Disabled: ☐

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

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

Unit: 4101, Tenant: Lindy Sue » Income

Bed 2 Sq Ft 970 System Designation Low Income Report Period 08/01/2022 - 08/31/2022 Last Report Ending 07/31/2022 Building FL-14-42130 Project FL-51202 - The Parker at Cone Phase II

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. Verify with Agency which fields are required to be completed.

New Income

Adding a new income to the system.

Member Information

*Member Name:

Relation: **Head of Household**

Income Source & Amount

Source of Income:

Annual Income: **Calculate**

Income Verification

Verification Source:

Verification Date:

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

Click **Save** when done with Income entries or **Save & New** to add additional Incomes or **Save & Close** when ready to move to next screen.

User can click on calculate **Calculate** to have system calculate each earned income. Enter Pay Rate, Frequency, Hours per Year and the system will calculate the Annual Income for each source entered. For each income to calculate, user will need to click **Apply**. The calculated incomes will populate the Annual Income box.

Calculate Annual Income

Pay Rate

Pay Frequency

Hours per Year

Annual Income

Apply **Cancel**

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

Unit: 4101, Tenant: Lindy Sue » Income

Bed 2 Sq Ft 970 System Designation Low Income Report Period 08/01/2022 - 08/31/2022 Last Report Ending 07/31/2022 Building FL-14-42130 Project FL-51202 - The Parker at Cone Phase II

New Income Close

<input type="checkbox"/>	Member Name	Source of Income	Verification	Annual Income
<input type="checkbox"/>	Lindy Sue Head of Household	Alimony/Child Support	07/01/2022 - Benefits Provider Verification	\$10,000.00
<input type="checkbox"/>	Lindy Sue Head of Household	Business Income	07/01/2022 - Bank/Trustee Verification	\$10,000.00

Annual Income: **\$20,000.00**

Annual Asset Income: **\$0.00** Total Annual Household Income: **\$20,000.00**

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

Click on **New Asset** to enter household asset data by Member Name. Fields with down arrows have drop down selections.

New Asset

Adding a new asset to the system.

Member Information

*Member Name: Danny Sue

Relation: Child/Stepchild

Asset Type & Value

Type of Asset: Bonds

*Cash Value: \$2,000

Annual Asset Income: \$1

Asset Verification

Verification Source: Bank/Tax Assessment

Verification Date: 07/01/2022

Save Save & New Save & Close Cancel

To enter rent data, click **Unit Rent** on the menu on the left side of the screen. Click **Edit** to access Rent fields.

General Information

Household Members

Income

Assets

Unit Rent

Unit: 4101, Tenant: Lindy Sue » Unit Rent

Bed

Sq Ft

System Designation

Report Period

Last Report Ending

Building

Project

2

970

Low Income

08/01/2022 - 08/31/2022

07/31/2022

FL-14-42130

FL-51202 - The Parker at Cone Phase II

Edit

Close

Rent Change Date:

Tenant Paid Rent: \$0.00

Mandatory Charges: \$0.00

Rental Subsidy: \$0.00

Utility Allowance: \$0.00 (Note: Please enter this amount only if paid by Tenant)

Gross Rent: \$0.00 (Tenant Rent + Mandatory Charges + Utility Allowance)

General Information

Household Members

Income

Assets

Unit Rent

Unit: 4101, Tenant: Lindy Sue » Unit Rent

Bed

Sq Ft

System Designation

Report Period

Last Report Ending

Building

Project

2

970

Low Income

08/01/2022 - 08/31/2022

07/31/2022

FL-14-42130

FL-51202 - The Parker at Cone Phase II

Rent Change Date:

Tenant Paid Rent: \$0.00

Mandatory Charges: \$0.00

Rental Subsidy: \$0.00

Utility Allowance: \$0.00 (Note: Please enter this amount only if paid by Tenant)

Gross Rent: \$0.00 (Tenant Rent + Mandatory Charges + Utility Allowance)

Save

Save & Close

Cancel

When all data is entered for a unit, click **Save & Close** to return to Unit list.

NOTE: 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: If tax credit only Gross Rent will include Tenant Paid, Mandatory Charges, and Utility Allowance. If HOME/TC or HOME only it will include all fields.

Page 16

SECTION 4

MANUAL ENTRY RECERTIFICATION

(Similar to Initial Move-Ins)

Highlight the project and **Proceed to Buildings** User can also access buildings by clicking on the blue link under the Buildings column.

Projects
Showing 1 - 50 of 677 records

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

Project ID	Project Name	2022 Annual Owner Certifications		Buildings	Contact Us
		Status	Last Submission Date		
FL-51202	The Parker at Cone Phase II 3000 Cone Crest Ct., Greenville, SC 29601	Not Submitted	01/24/2022	4	@
FL-96032	Simmons Cay Apartments 57 Simmonsville Road, Bluffton, SC 29910	Not Submitted	10/25/2021	6	@

Highlight the building then click **Proceed to Units**. User can also access units by clicking the blue link under the Units column.

Project: FL-51202 - The Parker at Cone Phase II » Buildings
Address: 3000 Cone Crest Ct., Greenville, SC 29601

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
FL-14-42130	04/07/2014	07/31/2022	08/01/2022 - 08/31/2022	Out of Compliance	Out of Compliance	In Compliance	Not Ready	07/01/2022	4

Highlight the unit then click **New Tenant Cert**

Building ID: FL-14-42130 » Units
Project: FL-51202 - The Parker at Cone Phase II

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	Ready to Submit	Last Certification Date	Re-Certification Due Date
4101	2	970	Occupied by Tenant	Lindy Sue	###-##-1111	—	07/02/2022	
4103	2	970	Occupied by Tenant	Sims, Irene	###-##-1111	—	05/01/2022	

Enter New Cert Date and click **Save**

Unit: 4101, Tenant: Lindy Sue » General Information

Bed: 2 Sq Ft: 970 System Designation: Low Income Report Period: 08/01/2022 - 08/31/2022 Last Report Ending: 07/31/2022 Building: FL-14-42130 Project: FL-51202 - The Parker at Cone Phase II

Head of Household Information

*Member Name: Lindy Sue Social Security Number: 000-00-1111

*Birth Date: 01/01/1959 Age: 63 Occupation: Business/Office

Sex: Female Marital Status: Single

Ethnicity: Tenant Declined to Respond Race: Chooses not to Disclose

Special Population: Disabled: ☐

Household Data

Move-In Date: 07/02/2022 Household Annual Income: \$20,000.00 *Unit Assistance Type: Other Federal Rental Assistance

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

Initial Certification: Ready to Submit: ☐ Family Size: 2 Restriction:

Contact Information

Home Phone: 111 - 123 - 4444 Work Phone: Email: lindy@gmail.com

Transfer Information

Transferred From Building: Old Unit ID: Old Unit Move-In:

Highlight the unit to open the record

General Information

Household Members

Income

Assets

Unit Rent

Unit: 4101, Tenant: Lindy Sue » Income

Bed 2 Sq Ft 970 System Designation Low Income Report Period 08/01/2022 - 08/31/2022 Last Report Ending 07/31/2022 Building FL-14-42130 Project FL-51202 - The Parker at Cone Phase II

[New Income](#) [Close](#)

<input type="checkbox"/>	Member Name	Source of Income	Verification	Annual Income
<input type="checkbox"/>	Lindy Sue Head of Household	Alimony/Child Support	07/01/2022 - Benefits Provider Verification	\$10,000.00
<input type="checkbox"/>	Lindy Sue Head of Household	Business Income	07/01/2022 - Bank/Trustee Verification	\$10,000.00

Annual Income: **\$20,000.00**

Annual Asset Income: **\$0.00** Total Annual Household Income: **\$20,000.00**

Click [Edit](#) to update the previous data. If new source of income click [New Income](#)

Income » Lindy Sue - Head of Household

Source of Income: **Alimony/Child Support**

[Edit](#) [Close](#)

Member Information

Member Name: **Lindy Sue**

Relation: **Head of Household**

Income Source & Amount

Source of Income: **Alimony/Child Support**

Annual Income: **\$10,000.00**

Income Verification

Verification Source: **Benefits Provider Verification**

Verification Date: **07/01/2022**

Click [Save](#) when done with Income entry or [Save & New](#) to add additional Incomes or [Save & Close](#) when ready to move to next screen.

Income Source & Amount

Source of Income: **Alimony/Child Support**

Annual Income: **\$10,000.00** [Calculate](#)

Income Verification

Verification Source: **Benefits Provider Verification**

Verification Date: **07/01/2022**

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

To add/update all household Assets, click **Assets** on the menu on the left side of the screen. Click **Edit** to update the previous data. If new source of asset click **New Asset**. Click **Save** when done with Asset entry or **Save & New** to add additional Assets or **Save & Close** when ready to move to next screen.

New Asset

Adding a new asset to the system.

Member Information

*Member Name:

Relation: **Child/Stepchild**

Asset Type & Value

Type of Asset:

*Cash Value:

Annual Asset Income:

Asset Verification

Verification Source:

Verification Date:

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

To enter rent data, click **Unit Rent** on the left side menu. Click **Edit** to access Rent fields and update record as needed.

General Information

Household Members

Income

Assets

Unit Rent

Unit: 4101, Tenant: Lindy Sue » Unit Rent

Bed 2 Sq Ft 970 System Designation Low Income Report Period 08/01/2022 - 08/31/2022 Last Report Ending 07/31/2022 Building FL-14-42130 Project FL-51202 - The Parker at Cone Phase II

Edit **Close**

Rent Change Date:

Tenant Paid Rent:

Mandatory Charges:

Rental Subsidy:

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

Gross Rent: (Tenant Rent + Mandatory Charges + Utility Allowance)

General Information

Household Members

Income

Assets

Unit Rent

Unit: 4101, Tenant: Lindy Sue » Unit Rent

Bed 2 Sq Ft 970 System Designation Low Income Report Period 08/01/2022 - 08/31/2022 Last Report Ending 07/31/2022 Building FL-14-42130 Project FL-51202 - The Parker at Cone Phase II

Rent Change Date:

Tenant Paid Rent:

Mandatory Charges:




Rental Subsidy:

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

Gross Rent: (Tenant Rent + Mandatory Charges + Utility Allowance)

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



Delete Tenant Certs


If a date of certification/recertification, move in or transfer was entered incorrectly, select the unit, and click Delete Tenant Certs by clicking  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.

Unit ID: 4101 » Tenant Certifications

Close

Project: FL-51202 - The Parker at Cone Phase II | Building: FL-14-42130

Move/Transfer In Date	Head of Household	Last Certification Date	Rent Change Date	Move/Transfer Out Date	
07/02/2022	Lindy Sue	07/03/2022			
07/02/2022	Lindy Sue	07/02/2022			


Are you sure you want to delete the selected Item?



OK

Cancel

Tenant Certification Form

- This form is the NCSHA best practice form.

Unit: 4101, Tenant: Lindy Sue » General Information

General Information

Household Members

Income

Assets

Unit Rent

Bed

Sq Ft

System Designation

Report Period

Last Report Ending

Building

Project

2

970

Low Income

08/01/2022 - 08/31/2022

07/31/2022

FL-14-421

FL-51202 - The Parker at Cone Phase II

Edit

Close

Income & Rent Test

Change Head of Household

Tenant Certification Form

Head of Household Information

Member Name: Lindy Sue

Social Security Number: 000-00-1111

Birth Date: 01/01/1959 Age: 63

Occupation: Business/Office

Sex: Female

Marital Status: Single

Ethnicity: Tenant Declined to Respond

Race: Chooses not to Disclose

Special Population:

Disabled:

Household Data

Move-In Date: 07/02/2022

Household Annual Income: \$20,000.00

Unit Assistance Type: Other Federal Rental Assistance

Last Cert Date: 07/05/2022

Non Qualified Students:

Owner's Designation: LIHTC


Initial Certification:

Family Size: 2

Restriction:

As long as a unit has not been submitted/posted, it is editable. Click  to open the record.

Building ID: FL-14-42130 » Units
Project: FL-51202 - The Parker at Cone Phase II

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

Units

Unit ID	No. of Bedrooms	Square Footage	Status	Head of Household	SSN	Ready to Submit	Last Certification Date	Re-Certification Due Date
4101	2	970	Occupied by Tenant	Lindy Sue	###-##-1111		07/05/2022	

Click [Edit](#) to open the record for correction.

Unit: 4101, Tenant: Lindy Sue » General Information

Bed: 2 Sq Ft: 970 System Designation: Low Income Report Period: 08/01/2022 - 08/31/2022 Last Report Ending: 07/31/2022 Building: FL-14-42130 Project: FL-51202 - The Parker at Cone Phase II

[Edit](#) [Close](#) [Income & Rent Test](#) [Change Head of Household](#) [Tenant Certification Form](#)

Head of Household Information

Member Name: **Lindy Sue** Social Security Number: **000-00-1111**

Birth Date: **01/01/1959** Age: **63** Occupation: **Business/Office**

Sex: **Female** Marital Status: **Single**

Ethnicity: **Tenant Declined to Respond** Race: **Chooses not to Disclose**

Special Population: Disabled: ☐

Certain data is now editable.


Unit: 4101, Tenant: Lindy Sue » General Information

Bed: 2 Sq Ft: 970 System Designation: Low Income Report Period: 08/01/2022 - 08/31/2022 Last Report Ending: 07/31/2022 Building: FL-14-42130 Project: FL-51202 - The Parker at Cone Phase II

[Edit](#) [Close](#) [Income & Rent Test](#) [Change Head of Household](#) [Tenant Certification Form](#)

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: **07/02/2022** Household Annual Income: **\$20,000.00** *Unit Assistance Type:

Last Cert Date: **07/05/2022** Non Qualified Students: ☐ *Owner's Designation:

Income and Rent Test can be accessed to check tenant data with the applicable income/rent limits prior to submission.

Unit: 4101, Tenant: Lindy Sue » General Information

Bed: 2 Sq Ft: 970 System Designation: Low Income Report Period: 08/01/2022 - 08/31/2022 Last Report Ending: 07/31/2022 Building: FL-14-42130 Project: FL-51202 - The Parker at Cone Phase II

[Edit](#) [Close](#) [Income & Rent Test](#) [Change Head of Household](#) [Tenant Certification Form](#)

Unit ID: 4101 » Household Income & Rent Limit Status

Project: FL-51202 - The Parker at Cone Phase II | Building: FL-14-42130 [Close](#)

Household Information

Unit ID: **4101**

Head of Household: **Lindy Sue**

Family Size: **2**

No. of Bedrooms: **2**

Household Income: **\$20,000.00**

Gross Rent: **\$0.00**

	Effective as of	Maximum Amount	Status
Income Limits	04/18/2022	\$40,920.00	Below Income Limit
Rent Limits	04/18/2022	\$1,150.00	Below Rent Limit

Click **Change Head of Household** to update Head of Household


Unit: 4101, Tenant: Lindy Sue » General Information

Bed	Sq Ft	System Designation	Report Period	Last Report Ending	Building	Project
2	970	Low Income	08/01/2022 - 08/31/22	07/31/2022	FL-14-42130	FL-51202 - The Parker at Cone Phase II


[Edit](#) [Close](#) [Income & Rent Test](#) [Change Head of Household](#) [Tenant Certification Form](#)

Templates

Scroll to the bottom of screen to

Miscellaneous 

Document Templates

Miscellaneous 

Showing 0 - 0 of 0 records

Template Name	Original Template Name	Uploaded By	Uploaded On
There are no document templates to show in this view.			

Click  **Name the Template > Choose File from user computer. Select applicable Save or Cancel.**

New Document Template

Adding a new document template to the system.

Upload Templates

*Please Select Template Category:

Template Name or Short Description:

*Please Browse to Select the Template: [Choose File](#) No file chosen

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

SECTION 5

MANUAL UNIT TRANSFER

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

2. Between Buildings (Multiple Building Project 8609 Election Yes)

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 previous day as the move out date in the unit being transferred into.

TRANSFER WITHIN SAME BUILDING

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

Projects					
Showing 1 - 50 of 677 records					
Import All Building Data Upload Files Annual Owner Certification Change Requests Proceed to Buildings					
Project ID	Project Name	2022 Annual Owner Certifications		Buildings	Contact Us
		Status	Last Submission Date		
FL-51202	The Parker at Cone Phase II 3000 Cone Crest Ct., Greenville, SC 29601	Not Submitted	01/24/2022	4	@

Highlight the building and click **Proceed to Units**

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
FL-14-42130	04/07/2014	07/31/2022	08/01/2022 - 08/31/2022	Out of Compliance	Out of Compliance	In Compliance	Not Ready	07/07/2022	24
FL-14-42131	04/24/2014	07/31/2022		Out of Compliance	Out of Compliance	In Compliance	Not Ready	07/07/2022	24

Highlight the unit that is transferring OUT and click **Unit Transfer**

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	Ready to Submit	Last Certification Date	Re-Certification Due Date	
4101	2	970	Occupied by Tenant	Lindy Sue	###-##-1111	---	07/05/2022		X
4103	2	970	Occupied by Tenant	Sims, Irene	###-##-1111	---	05/01/2022		X

Unit ID: 4103 » Unit Transfer

Project: FL-51202 - The Parker at Cone Phase II | Building: FL-14-42130

Unit Transfer Data

Current Unit: 4103

Current Building: FL-14-42130

New Building ID: FL - 14 - 42130

*New Unit:

*Transfer Effective Date:

Tenant Paid Rent: \$730.00

Mandatory Charges: \$0.00

Rental Subsidy: \$0.00

Utility Allowance: \$79

Gross Rent: \$809.00

Maximum Section 42 Rent: \$1,150.00

Maximum HOME Rent: \$868.00

Transfer Cancel

This box will only appear if Multiple Building was elected on the 8609 and transfers are allowed between buildings. The ampersand will show available buildings in the project.

Select New Unit (The dropdown box will only show units that are Vacant) and enter Transfer Effective Date.

Enter all other applicable data and click **Transfer**

New Building ID: **FL** - **14** - **42130** ...

Unit Transfer Data

Current Unit: **4103**

Current Building: **FL-14-42130**

New Building ID: **FL** - **14** - **42130** ...

*New Unit:

*Transfer Effective Date:

Tenant Paid Rent:

Mandatory Charges:

Rental Subsidy:

Utility Allowance:

Gross Rent:

\$0.00

Maximum Section 42 Rent:

\$1,150.00

Maximum HOME Rent:

\$868.00

Transfer

SECTION 6 MANUAL MOVE OUT

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

Projects

Showing 1 - 50 of 677 records



Import All Building Data

Upload Files

Annual Owner Certification

Change Requests

Proceed to Buildings

Project ID	Project Name	2022 Annual Owner Certifications		Buildings	Contact Us
		Status	Last Submission Date		
 FL-51202	The Parker at Cone Phase II 3000 Cone Crest Ct., Greenville, SC 29601	Not Submitted	01/24/2022	4	

Highlight the building and click **Proceed to Units**

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	
FL-14-42130	04/07/2014	07/31/2022	08/01/2022 - 08/31/2022	Out of Compliance	Out of Compliance	In Compliance	Not Ready	07/07/2022	24	
FL-14-42131	04/24/2014	07/31/2022		Out of Compliance	Out of Compliance	In Compliance	Not Ready	07/07/2022	24	

Highlight the unit to Move Out and click **Move Out**

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	Ready to Submit	Last Certification Date	Re-Certification Due Date		
4101	2	970	Occupied by Tenant	Lindy Sue	###-##-1111	---	07/05/2022			
4103	2	970	Occupied by Tenant	Sims, Irene	###-##-1111	---	05/01/2022			

Enter Move Out Date as required, and Eviction data is optional when it applies. Click

Move Out

Unit ID: 4103 » Unit Move Out

Project: FL-51202 - The Parker at Cone Phase II | Building: FL-14-42130

Building ID: FL-14-42130

Unit ID: 4103

Head of Household: Sims, Irene

*Move Out Date:

☐ Eviction

Reason for Eviction:

Move Out Cancel

SECTION 7

3RD PARTY SOFTWARE TENANT DATA IMPORT

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

UPLOADING ALL BUILDING XML FILE

Some 3rd party software programs (i.e., Yardi, RealPage, etc.) create an XML file that includes tenant data for all buildings in the project, highlight the project and click

Import All Building Data

Projects
Showing 1 - 50 of 677 records

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

Project ID	Project Name	2022 Annual Owner Certifications		Buildings	Contact Us
		Status	Last Submission Date		
FL-51202	The Parker at Cone Phase II 3000 Cone Crest Ct., Greenville, SC 29601	Not Submitted	01/24/2022	4	@

Click **Choose File** located on user computer.

Name	Date modified	Type
April 2021	4/26/2022 12:16 PM	XML File
August 2021	4/26/2022 12:16 PM	XML File
December 2021	4/26/2022 12:16 PM	XML File
Feb 2021	4/26/2022 12:16 PM	XML File

Select the XML file and click **Upload Document** to complete the process.

Project: FL-51202 - The Parker at Cone Phase II » Upload All Building Data
Address: 3000 Cone Crest Ct., Greenville, SC 29601

*Please Browse to Select the Document:

☐ Overwrite existing Unit Activity

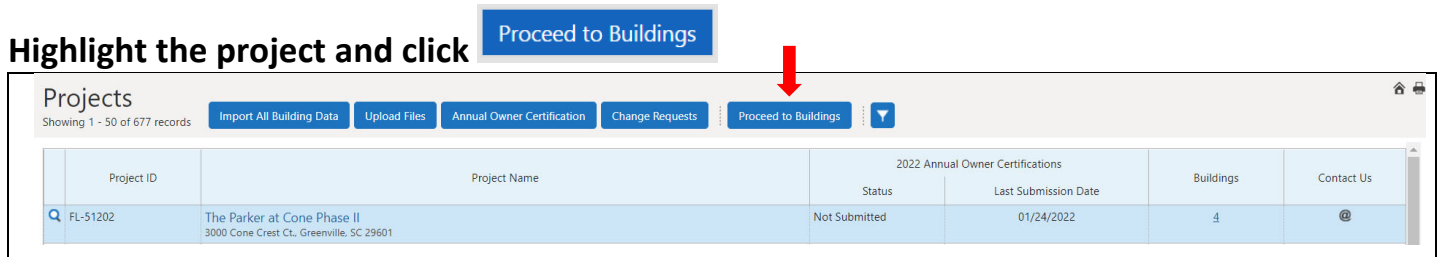
Upload Document

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

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, user can go to the Building Screen to upload the buildings individually.

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

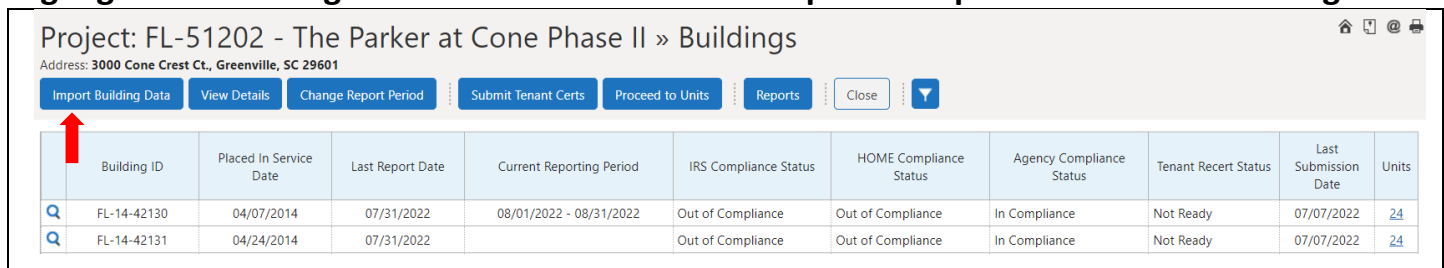


Project ID	Project Name	2022 Annual Owner Certifications		Buildings	Contact Us
		Status	Last Submission Date		
FL-51202	The Parker at Cone Phase II 3000 Cone Crest Ct., Greenville, SC 29601	Not Submitted	01/24/2022	4	@

Highlight the building and click **Import Building Data** to complete the process for each building.

Project: FL-51202 - The Parker at Cone Phase II » Buildings
 Address: 3000 Cone Crest Ct., Greenville, SC 29601

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
FL-14-42130	04/07/2014	07/31/2022	08/01/2022 - 08/31/2022	Out of Compliance	Out of Compliance	In Compliance	Not Ready	07/07/2022	24
FL-14-42131	04/24/2014	07/31/2022		Out of Compliance	Out of Compliance	In Compliance	Not Ready	07/07/2022	24

Click Choose File located on user computer.

Name	Date modified	Type
April 2021	4/26/2022 12:16 PM	XML File
August 2021	4/26/2022 12:16 PM	XML File
December 2021	4/26/2022 12:16 PM	XML File
Feb 2021	4/26/2022 12:16 PM	XML File

Select the XML file and click **Upload Document** to complete the process.

Building ID: FL-14-42130 » Upload Data
 Project: FL-51202 - The Parker at Cone Phase II

*Please Browse to Select the Document:

☐ Overwrite existing Unit Activity

Upload Document



The XML 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 Continue this process until all buildings have been uploaded.

Once all data has been uploaded and reviewed, click

Proceed to Units

and click on

Ready All Units

Project: FL-51202 - The Parker at Cone Phase II » Buildings

Address: 3000 Cone Crest Ct., Greenville, SC 29601

[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
FL-14-42130	04/07/2014	07/31/2022	08/01/2022 - 08/31/2022	Out of Compliance	Out of Compliance	In Compliance	Not Ready	07/07/2022	24

Building ID: FL-14-42130 » Units

Project: FL-51202 - The Parker at Cone Phase II

[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	Ready to Submit	Last Certification Date	Re-Certification Due Date
4101	2	970	Occupied by Tenant	Lindy Sue	###-##-1111	—	07/05/2022	
4103	2	970	Occupied by Tenant	Sims, Irene	###-##-1111	—	05/01/2022	

Building ID: FL-14-42130 » Units

Project: FL-51202 - The Parker at Cone Phase II

[New Unit](#)
[Unit Definition](#)
[Income & Rent Test](#)
[New Tenant Cert](#)
[Delete Tenant Certs](#)
[Move Out](#)
[Unit Transfer](#)
[Unready All Units](#)
[Close](#)

Unit ID	No. of Bedrooms	Square Footage	Status	Head of Household	SSN	Ready to Submit	Last Certification Date	Re-Certification Due Date
4101	2	970	Occupied by Tenant	Lindy Sue	###-##-1111	✓	07/05/2022	
4103	2	970	Occupied by Tenant	Sims, Irene	###-##-1111	✓	05/01/2022	

SECTION 8

Download and Upload Forms And Annual and Inspection Documents

UPLOAD COMPLETED FILES (Documents)

Click on **Projects** to access Projects list. Highlight the project and click **Upload Files**

Projects
Showing 1 - 50 of 677 records

[Import All Building Data](#)
[Upload Files](#)
[Annual Owner Certification](#)
[Change Requests](#)
[Proceed to Buildings](#)

Project ID	Project Name	2022 Annual Owner Certifications		Buildings	Contact Us
		Status	Last Submission Date		
FL-51202	The Parker at Cone Phase II 3000 Cone Crest Ct., Greenville, SC 29601	Not Submitted	01/24/2022	4	@

Scroll to the bottom to **Miscellaneous** and click **New**

Project: FL-51202 - The Parker at Cone Phase II » Upload Files
Address: 3000 Cone Crest Ct., Greenville, SC 29601

[Close](#)

Miscellaneous

[New](#)
[Delete](#)

Showing 1 - 2 of 2 records

	Document Name	Original File Name	Reporting Period	Uploaded By	Submit Status
<input type="checkbox"/>	SC-51202-The Parker at Cone II - Audit - 2020	229 Cone Development II, LLC 12-31-2020 FS with signatures.pdf		Jeremy Burris	
<input type="checkbox"/>	Auditors & Inspections	Setting up Auditors & Inspections.docx		Emphasys Software	

Document Type will be Miscellaneous. Enter a Document Title. Choose File from user computer and click applicable [Save](#) [Save & New](#) [Save & Close](#) [Cancel](#)

New File
Adding a new file to the system.

General Information

*Document Type: Miscellaneous

*Document Title:

Document Upload

*Select File: Choose File No file chosen

Name	Date modified	Type
1. 2021_Annual_Report_Memo	12/28/2022 8:43 PM	Adobe Acrobat Docum...
a. Checklist-2021	12/28/2022 8:43 PM	Microsoft Word Docum...
b. 2020 Owner Certification-2021	12/28/2022 8:43 PM	Microsoft Word Docum...
c. Exhibit A -LIHTC Certification-2021	12/28/2022 8:43 PM	Microsoft Word Docum...
d. Exhibit B -HOME Certification-2021	12/28/2022 8:43 PM	Microsoft Word Docum...
e. Exhibit C -LIHTC Qualified Nonprofit Certification-2...	12/28/2022 8:43 PM	Microsoft Word Docum...

SECTION 9

ANNUAL OWNER CERTIFICATION

Highlight project and select

Annual Owner Certification

Projects
Showing 1 - 50 of 677 records
Import All Building Data
Upload Files
Annual Owner Certification
Change Requests
Proceed to Buildings

Project ID	Project Name	2022 Annual Owner Certifications		Buildings	Contact Us
		Status	Last Submission Date		
FL-51202	The Parker at Cone Phase II 3000 Cone Crest Ct., Greenville, SC 29601	Not Submitted	01/24/2022	4	@

This is the NCSHA best practice form. There are a total of 16 questions and the system default all radio buttons to In Compliance options. Complete the form based on the property status and click **Annual Owner Certification** to print the document. Click applicable Save option and/or **Submit Certification** to auto send it to the Agency. This page must be submitted before the buildings can be submitted.

General Information
Import All Building Data
Upload Files
Annual Owner Certification
Change Requests
Buildings (4)

Project: FL-51202 - The Parker at Cone Phase II » General Information

Address: 3000 Cone Crest Ct., Greenville, SC 29601
Owner: F-274845777 Cone Development II LLC
Last Certification Ending: 12/31/2021
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

3. The owner has received an annual Tenant Income Certification from each low-income resident and documentation to support that certification:
☒ Yes
☐ No
☐ N/A

4. Each low-income unit in the project has been rent-restricted under Section 42(g)(2) of the Code:
☒ Yes
☐ No

Save
Save & Close
Submit Certification
Cancel
Annual Owner Certification Form

SECTION 10

REVIEWING DATA AND SUBMITTING TO AGENCY

REVIEWING UNIT DATA. This is highly recommended before submitting to Agency to verify all data entries are correct.

Highlight a building and click Reports

Project: FL-51202 - The Parker at Cone Phase II » Buildings

Address: 3000 Cone Crest Ct., Greenville, SC 29601

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
🔍	FL-14-42130	04/07/2014	07/31/2022	08/01/2022 - 08/31/2022	Out of Compliance	Out of Compliance	In Compliance	Ready	07/07/2022	24

This report will only list any unit that has data entered in the applicable reporting period. If user wants to see all units, check the box to Include Units without recent activity. User can also run the report for All Buildings by checking the box.

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

Emphasys HFA 2022 User Conference

LIHTC/HOME Annual Occupancy Report

* Denotes a transfer from/to another unit in the same building.

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 1/6/2023 by Emphasys Software

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	Mkt Unit Y/N
Project: FL-51202 The Parker at Cone Phase II, Project Address: 3000 Cone Crest Ct.																				
Building: FL-14-42130, Total Number of Units: 24																				
4101	970	2	07/02/2022		###-##-1111	Lindy Sue	07/05/2022		N	63	\$20,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	2	N		N
4101	970	2			###-##-1111	Lindy Sue	07/02/2022		Y	63	\$20,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	2	N		N
4101	970	2	05/02/2014	07/01/2022	###-##-1111	Wilson, Carolyn	05/01/2022	05/01/2022	N	75	\$10,692.00	\$730.00	\$0.00	\$0.00	\$0.00	\$79.00	2	N		N

This report will identify the status of Income and Rent for all units entered.

Household Income & Rent Limits Status

Detail Report

Emphasys HFA 2022 User Conference

Household Income & Rent Limits Status Report

Generated on 1/6/2023 by Emphasys Software

Page 1 of 1

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: FL-51202 The Parker at Cone Phase II, Project Address: 3000 Cone Crest Ct.														
Building: FL-14-42130, County: Greenville														
4101	2	Lindy Sue	2	07/02/2022	07/05/2022		\$20,000.00	\$40,920	04/18/2022	Below Income Limit	\$0.00	\$1,150	04/18/2022	Below Rent Limit
4101	2	Lindy Sue	2	07/02/2022	07/02/2022		\$20,000.00	\$40,920	04/18/2022	Below Income Limit	\$0.00	\$1,150	04/18/2022	Below Rent Limit
4101	2	Wilson, Carolyn	2	05/02/2014	05/01/2022	05/01/2022	\$10,692.00	\$40,920	04/18/2022	Below Income Limit	\$809.00	\$1,150	04/18/2022	Below Rent Limit
4103	2	Sims, Irene	1	05/01/2014	05/01/2022	05/01/2022	\$22,149.44	\$35,820	04/18/2022	Below Income Limit	\$809.00	\$1,150	04/18/2022	Below Rent Limit


SECTION 11

MANAGEMENT CONTROLS

(SUPER USER)


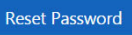


On-Site Managers

Manage On-Site Managers

To create On-Site Managers, click  and enter required data. Select applicable Save option. All managers set up in this screen will show in a list here.

On-Site Managers

Showing 0 - 0 of 0 records

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

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:

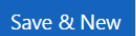
☐


Login Information


*User Name:

*Password:

 Save

 Save & New

 Save & Close

 Cancel

On-Site Managers

Project Assignment

Drop down menu to find Manager name.

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.		

Manage On-Site Managers

Project Assignment

On-Site Manager Project Assignment

Select On-Site Manager For Project Assignment

James Brown

Showing 1 - 1 of 1 records

Project ID	Project Name	Assigned On-Site Managers
2022-28	LS Test 2289 Pear Ln, Abbeville, CO 50156	--UNASSIGNED--

Update Cancel

Project Assignment

Showing 1 - 1 of 1 records

Project ID	Project Name	Assigned On-Site Managers
2022-28	LS Test 2289 Pear Ln, Abbeville, CO 50156	James Brown

Reset Password

To reset User password, click **Reset Password**


The screenshot shows the 'On-Site Manager » Test Tested' interface. At the top, there are buttons for 'Edit', 'Close', 'Reset Password', and 'Unlock Projects'. Two red arrows point to the 'Reset Password' and 'Unlock Projects' buttons. Below the header, a dialog box displays the message: 'emphasys-hfa-dev.eastus.cloudapp.azure.com says Are you sure you want to reset this on-site manager's password?'. The dialog has 'OK' and 'Cancel' buttons. Below the dialog, a confirmation message reads: 'Successful Reset The password for this on-site manager has been successfully reset.' with an 'OK' button.

Unlock Projects

There are times when a manager is working in a project and may lose connection with the system which can cause the last project worked in to lock where no user can access it. To unlock the project, click

Unlock Projects

The screenshot shows the 'On-Site Manager » Test Tested' interface. A dialog box displays the message: 'emphasys-hfa-dev.eastus.cloudapp.azure.com says Are you sure you want to unlock all projects for this on-site manager?'. The dialog has 'OK' and 'Cancel' buttons. Below the dialog, a confirmation message reads: 'Projects Unlocked The projects for the selected on-site manager(s) has/have been successfully unlocked.' with an 'OK' button.

 **Emphasys**

My Account

Log Out

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