

# NextGen External User's Guide

Eff. 8/1/2021

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## ❖ What is NextGen?

NextGen is a web-based application used to collect tenant occupancy and demographic data for properties with low-income housing tax credits (LIHTC) or CHFA Loans. NextGen is replacing the system known as WCMS.

## ❖ What data do I need to enter in NextGen?

All certification activity is required to be uploaded or manually entered in NextGen on a monthly basis, preferably by the 10<sup>th</sup> of the month but no later than the end of the month following the certification date. Certifications that must be entered include:

- All move-in and initial certifications\*
- Annual recertifications
- Interim certifications\*\*
- Unit transfers
- Move-out certifications

\* An initial certification should only be created if a property is leasing up after substantial rehabilitation or if an existing market-rate tenant has become eligible for the low-income program. Do not use this option for new occupants to your property.

\*\* Interim certifications are only required by CHFA if an adult (18 years old or older) is being added to the household before the next-scheduled annual recertification. All other changes can be entered with the next annual recert.

### Tenant Data Uploads:

Certain property software products can create a data file that contains your tenants' certification data. This data file, which is formatted especially for the purpose of uploading tenant data, can then be uploaded into NextGen. Uploading your monthly tenant certifications can save you time by eliminating the need to manually enter this data.

Currently, this feature is available with:

- Yardi
- Real Page's OneSite
- HAB, Inc.
- Boston Post

Please contact your property software's technical support for more information. PLEASE NOTE: If your product is an older version that only supports NAHMA versions 3.1 or 4.0 (NextGen currently accepts versions 5.0 and 6.0 only), you will need to request that your property's software is updated to support these newer versions.

For more information about uploading your tenant data, please refer to "XML Tenant Upload Tab" on page 22. If you have any questions, please contact Peggy Boyd at CHFA for more information ([pboyd@chfainfo.com](mailto:pboyd@chfainfo.com)).


## ❖ Registering for a new account

If you do not already have a WCMS or NextGen account, you will first need to complete the registration request form. CHFA staff cannot create an account for you. If you previously had a WCMS account, you will be able to log into NextGen using your WCMS credentials.

To register, please follow these instructions:

First, navigate to the NextGen Log In screen: <https://co-ng.hdsoftware.net/auth/login>, and click the link to create a new account.

To complete the registration form, please follow these steps: (Figure 1, next page):

1. Select "Compliance User" from the Account Type drop-down.
2. Enter your first and last name
3. Enter your company email address.  
  
NOTE: The NextGen system will not allow for users to use an email address that is already assigned to another user. If you share an email address with others in your organization, please contact Peggy Boyd at [pboyd@chfainfo.com](mailto:pboyd@chfainfo.com).
4. Create a "generic" username, such as your first initial and last name. It is recommended that you do not use the property name as your username, since multiple properties can be added to an individual account and your user account can be used if you move to a different property. Don't forget to make a note of the username you create.
5. Create a strong password, containing at least 8 characters.
6. Confirm the password you created. Don't forget to make a note of the password you create.
7. Enter your Organization Name (this can be either the property you manage or the management/ownership company you are employed by)
8. Enter your Organizational Role (select the option that best fits your position)
9. Enter the address, city, state and zip code of your property/organization
10. Enter your business phone number
11. Click the blue "+" under the Request Site Access section. 
  - a. In the Add Site window (Figure 2), type the CHFA property name and/or property number for each property that you will need to access in the system.  
  
\*Note: Property names/numbers must be entered exactly as they appear in CHFA's system; if you do not have this info, please refer to the LIHTC/CHFA Loan Properties report located at: <https://www.chfainfo.com/arh/asset/Pages/wcms.aspx>.
  - b. Click the blue Add Site button.
  - c. **Repeat steps 11a. and 11b. for each property that needs to be accessed in NextGen**
12. To complete your registration, click the "I agree to EULA terms and conditions" box then Create Account

**NOTE:** All registration requests will need to be approved by CHFA before you will be able to log into the system. You will receive an email once this has been completed.

## Registering for a new account (continued)



Information entered into the NextGen system is of a personal and sensitive nature. To help maintain the security of this data, PLEASE DO NOT SHARE ACCOUNT LOG INS. All users should have his or her own NextGen account.

Figure 1

Asset Management User  
 Compliance User

Already have an account? [Sign in here](#)

### Registrant Information

First Name \*  
Peggy

Last Name \*  
Boyd

Email \*  
pboyd@email.com

User Name \*  
peggyb

Password \*  
.....

Confirm Password \*  
.....

### Organization Information

Name \*  
ABC Management

Organizational Role \*  
Management Agent

Address \*  
123 Main Street

City \*  
Denver

State \*  
Colorado

Zip Code \*  
80202

Phone \*  
(303)297-7312

### Request Site Access

Actions	Site Name	Site Number
...	WCMS Test Property	WCMS-Test

I agree to EULA terms and conditions. [View EULA](#) [Create Account](#)

Figure 2

**Add Site**

Site Name  
Altitude  
Site Number  
9200-617

Zip Code \*

[Add Site](#)

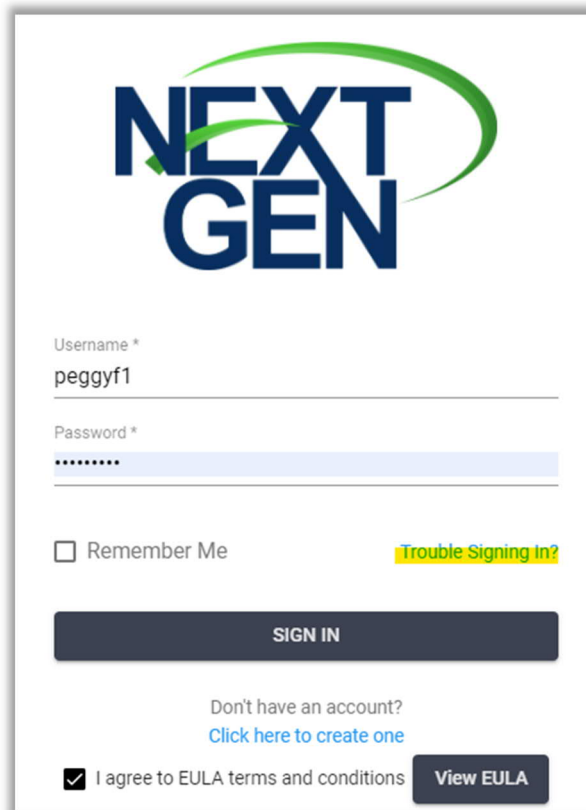
No data

## ❖ Logging In to NextGen

To log into NextGen:

1. Navigate to the NextGen Log In screen: <https://co-ng.hdsoftware.net/auth/login>
2. Enter the Username and Password you created when registering, or your current WCMS credentials
3. Agree to the EULA terms and conditions
4. Click Sign In. (Figure 3)

Figure 3



Username \*

peggyf1

Password \*

.....

Remember Me [Trouble Signing In?](#)

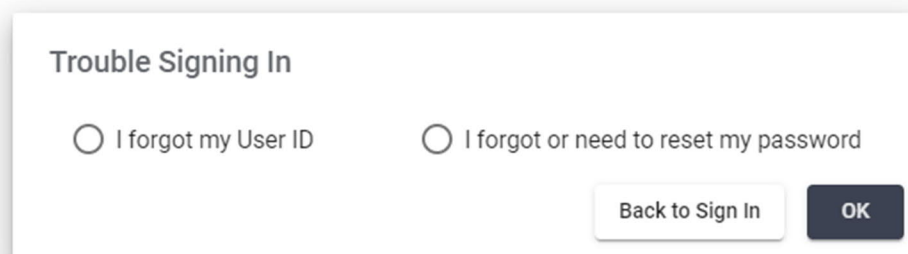
**SIGN IN**

Don't have an account?  
[Click here to create one](#)

I agree to EULA terms and conditions **View EULA**

If you have forgotten your username or password, click the “Trouble Signing In?” link on the NextGen login screen. Then, select the appropriate selection in the “Trouble Signing In” screen (Figure 4), and click “OK”. The system will send an email with instructions on how to proceed.

Figure 4



**Trouble Signing In**

I forgot my User ID       I forgot or need to reset my password

**Back to Sign In**      **OK**

❖ Welcome to NextGen!

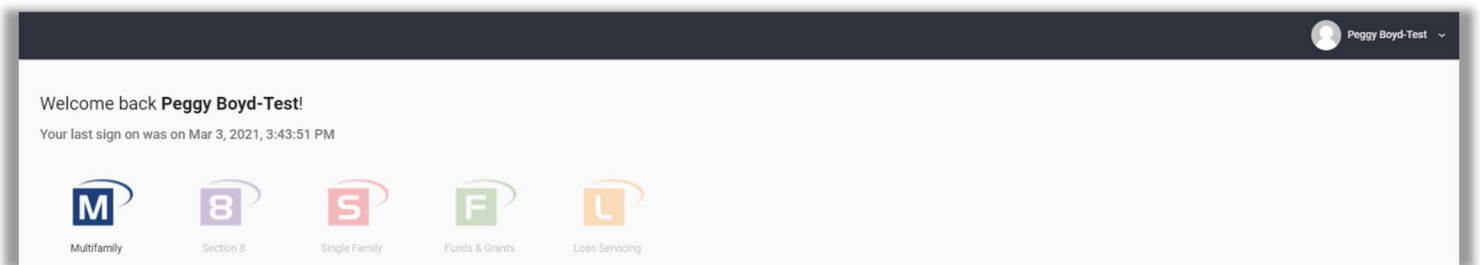
Landing Page:

With each new login, you will be directed to NextGen's Landing Page (Figure 5). Click on the M (Multifamily) icon to continue to your Home Page.



 If the Multifamily icon is greyed-out, please refresh your browser.

Figure 5

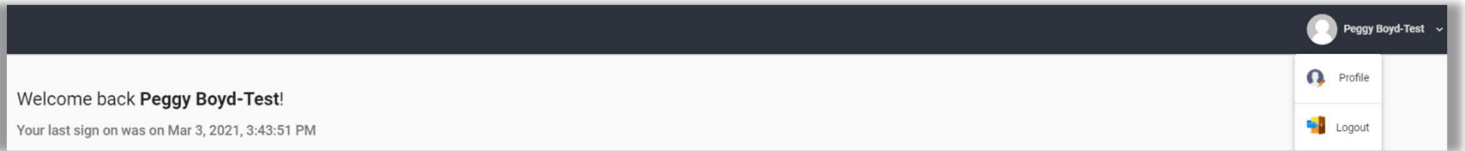


## ❖ Home Page Features

### Profile:

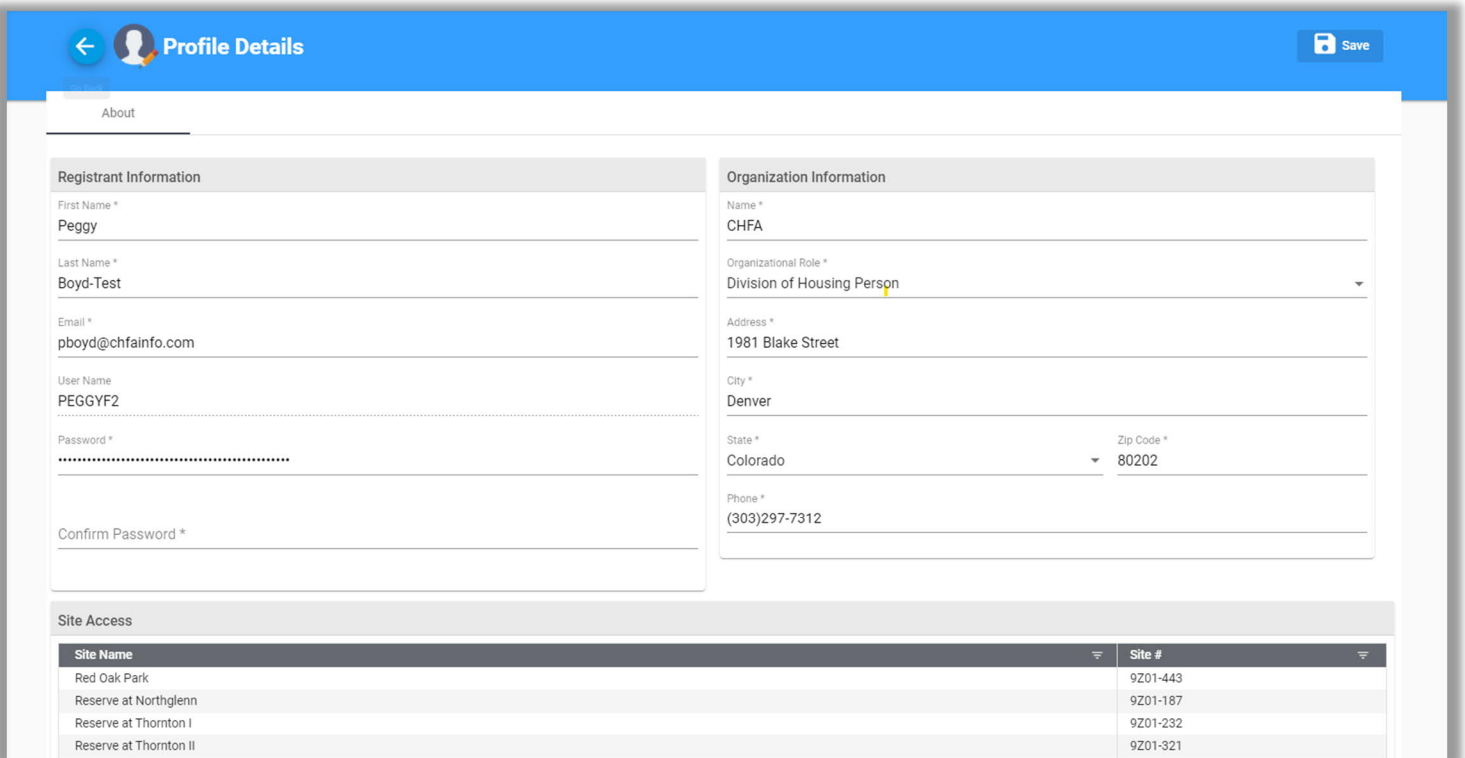
On the Landing Page, and all the other pages throughout NextGen, you will see your name at the top right of the screen (Figure 6). Clicking the down-arrow next to your name will allow you to view/edit your Profile and logout of the system.

Figure 6



When making edits to your Profile Details, please be sure to click Save in the top right of the screen before exiting. Included on your Profile Details screen is a list of all the sites for which you have access in the system, including the CHFA Site # (Figure 7).

Figure 7



## Home Page Features (continued)

 **NAVIGATION TIP:** Click the “Home” icon from any screen within NextGen to navigate back to the Home Page, or the “Waffle” icon to return to the Landing Page.



On your NextGen Home Page, you will see a variety of menus and icons to help you navigate the system (Figure 8). Additionally, if your portfolio includes properties with low income housing tax credits (LIHTC), you will see a graph of Vacant Units by Site. To select a different property for this graph, click the down-arrow next to the property name to access the drop-down list.


 If you have properties that only have CHFA Loans, those properties are not currently available in the “Vacant Units by Site” graph. We are working with the software company to add these other property types in a later release.

Figure 8



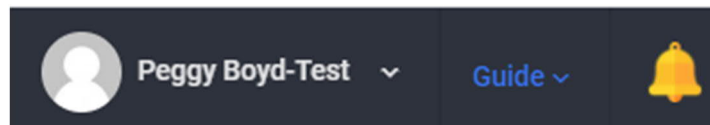
Icons:

### Top right corner (Figure 9)

These navigation items are viewable from all pages throughout NextGen:

- Your Profile (found by clicking the arrow or “carrot” next to your username)
- Guide: The software company’s user guide
- Bell icon: If any alerts or notifications are available, they will appear here.

Figure 9





## Home Page Features (continued)

### Icons:

#### Top left corner (Figure 10)

This navigation pane is viewable from all pages throughout NextGen. The icons below from left to right are:

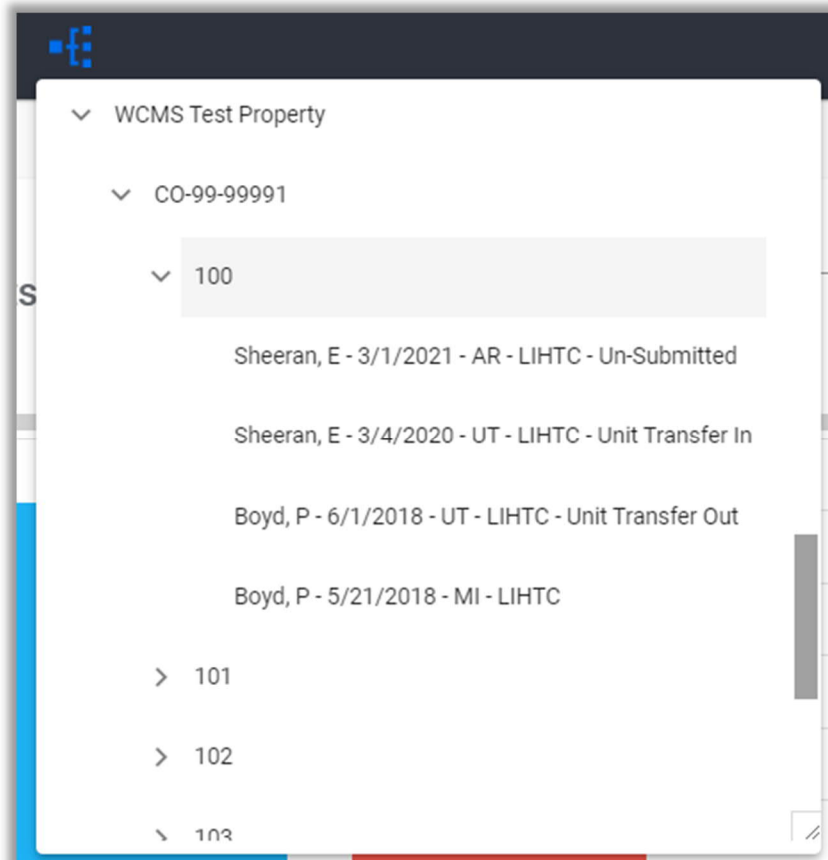
- “M” HDS Multifamily – indicates that you are currently active in the Multifamily module. Click the “push-pin” icon to show or hide the left navigation menu. (See page 10 for more info)
- Waffle icon – Use this icon to navigate back to the NextGen Landing Page
- Home icon – Use this icon to navigate back to the Home Page
- Star icon – Screens that are marked as favorites can be found here. To save a favorite, click the Star icon and then select which screens you wish to keep as a favorite. Your favorites will then appear as icons at the top.
- Tree icon – Allows you to navigate to a specific site’s units and tenant certifications in “Edit” mode. (Figure 11)

Note: Navigation to the Site Info and Building Info pages is not available to external users.

Figure 10



Figure 11



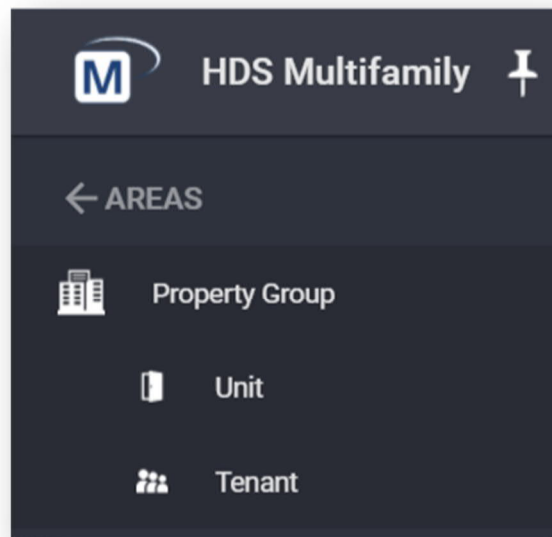
## Home Page Features (continued)

Menus:

### Left Navigation (Figure 12):


- Select the area you wish to view by clicking on either Unit or Tenant from the left navigation menu.
- Click the “push-pin” to the right of “HDS Multifamily” to hide/unpin or show/pin the left-navigation menu. Hiding the menu will give a larger desktop view of the screens you are viewing.

Figure 12



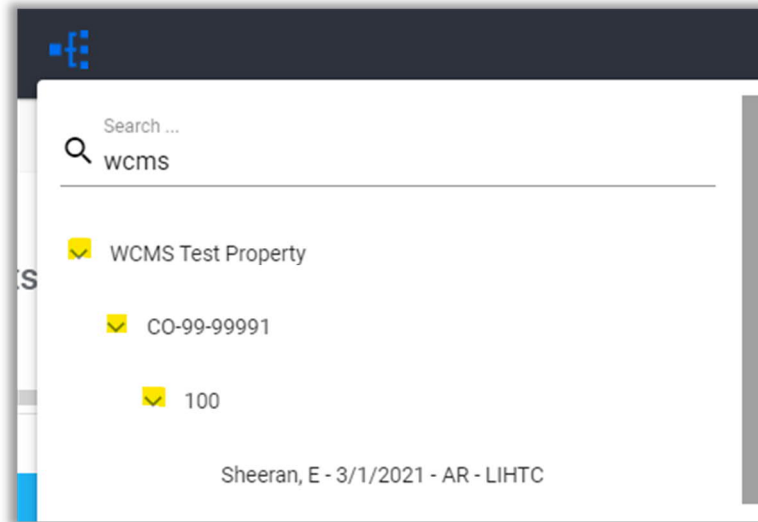
By design, external users will only see the options to view the units and tenant data for their properties. At this time, external users will not see any property or building data.

## ❖ Unit Page Features

To navigate to the Unit page (page 12, Figure 14), you can either click “Unit” from the left-navigation menu or select the unit from the  tree icon.

 To select a Unit from the tree icon, first click the “carrots” to the left of the Site name and Building number. Then, click on the desired Unit number to select it. (Figure 13)

Figure 13



### Adding a Unit:

To add a new unit to the building, click the blue “+ Unit” icon at the upper right portion of the Unit page



The Unit page has two tabs at the top: Search and Reports

### Search tab:

When navigating to the Unit screen, the system takes you to the Search tab by default (tabs are shown at the top of the page). Users can do a simple search from this screen or choose to click on the blue Advanced Search button to enter other criteria, such as:

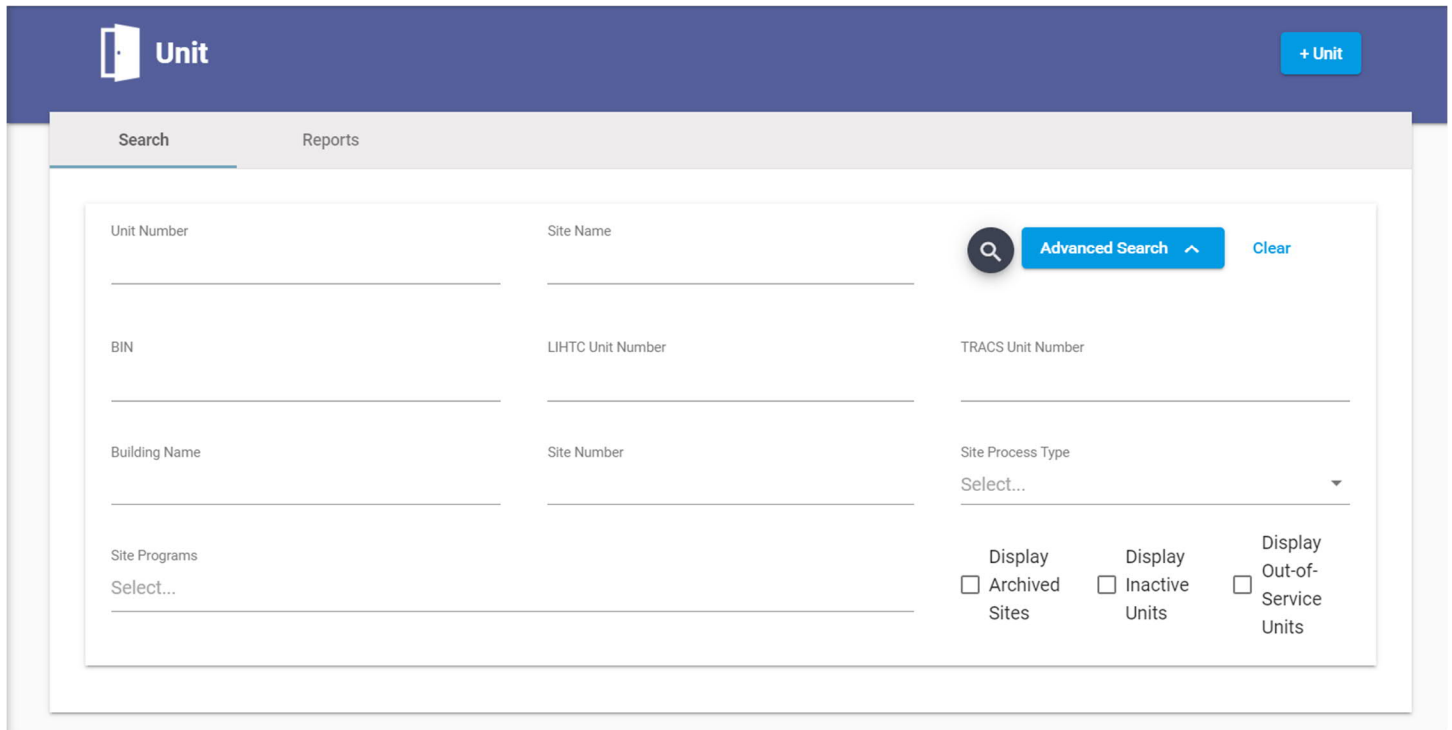
- BIN
- LIHTC Unit Number
- TRACS Unit Number
- Building Name
- Site Number
- Site Process Type

## Unit Page Features (continued)




Once you have entered the criteria for your search, click the looking glass icon.



Figure 14

The screenshot shows the 'Unit' search interface. At the top, there is a dark blue header with the 'Unit' logo and a '+ Unit' button. Below the header, there are two tabs: 'Search' (active) and 'Reports'. The main search area contains several input fields: 'Unit Number', 'Site Name', 'BIN', 'LIHTC Unit Number', 'TRACS Unit Number', 'Building Name', 'Site Number', and 'Site Process Type' (a dropdown menu). At the bottom, there are three checkboxes: 'Display Archived Sites', 'Display Inactive Units', and 'Display Out-of-Service Units'. A search button with a magnifying glass icon and the text 'Advanced Search' is located on the right side of the search area, along with a 'Clear' button.

Upon clicking the looking glass icon, the system will display the search results in a grid at the bottom of the screen (page 13, Figure 15). Use the grid in the following ways to edit the way you view the data:

- Click on column headers to sort by specific columns. For instance, clicking on the Unit Number heading will sort the search results in ascending or descending unit number order.
- Click on the Column Chooser icon  to open that window, then drag column headers that are not needed to that window.
- Click on the Export all data icon  to export the search results to Excel.
- To filter data, click the smaller looking glass at the top of the column . For example, if you only wanted to see units in Bldg. 3, you would click the looking glass in the Building Name column, then select the filter criteria of "Contains". Finally, type 3 in the field just below the column's heading. The result will show only the units that are in that building. To get back to the unfiltered list, just select "Reset" from the filter criteria.
- To group your data by a specific column, click on the column header of your choice and drag it to the area above the grid.

## Unit Page Features (continued)

Specific Actions can be done from the Unit grid, by clicking the three dots (...) to the left of the unit number, under the "Actions" column header (Figure 15):

Figure 15

The screenshot shows a web interface for managing units. At the top, there are tabs for "Search" and "Reports". Below the tabs is a search bar with fields for "Unit Number" and "Site Name" (containing "wcms"). A search icon, an "Advanced Search" dropdown, and a "Clear" button are also present. Below the search bar is a section for column grouping with the text "Drag a column header here to group by that column" and a search input. The main part of the interface is a table with the following columns: Actions, Unit Number ↑, LIHTC Unit Number, TRACS Unit Number, Vacant, BIN, Building Name, Site Number, and Site Name. The table contains several rows of unit data. A dropdown menu is open over the "Actions" column, showing "Edit" and "Cert Actions" options. The unit with Unit Number 102 is highlighted in light blue.

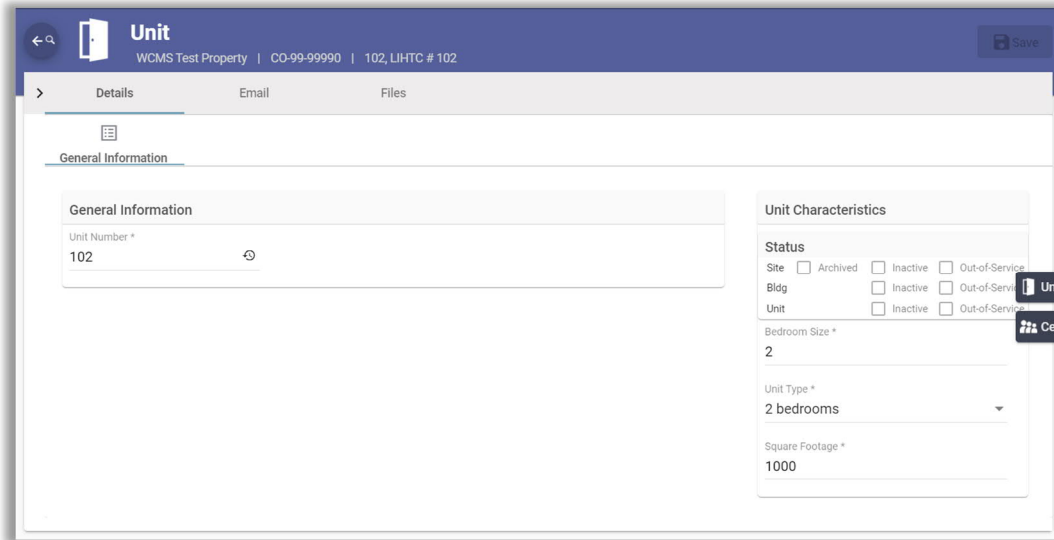
Actions	Unit Number ↑	LIHTC Unit Number	TRACS Unit Number	Vacant	BIN	Building Name	Site Number	Site Name
...	100	100		<input type="checkbox"/>	CO-99-99990	Bldg 1	WCMS-Test	WCMS Test I
...	101	101		<input type="checkbox"/>	CO-99-99990	Bldg 1	WCMS-Test	WCMS Test I
...	102	102		<input checked="" type="checkbox"/>	CO-99-99990	Bldg 1	WCMS-Test	WCMS Test I
Edit	103	103		<input type="checkbox"/>	CO-99-99990	Bldg 1	WCMS-Test	WCMS Test I
	104	104		<input type="checkbox"/>	CO-99-99990	Bldg 1	WCMS-Test	WCMS Test I
Cert Actions	200	200		<input type="checkbox"/>	CO-99-99991	Bldg 2	WCMS-Test	WCMS Test I
	201	201		<input type="checkbox"/>	CO-99-99991	Bldg 2	WCMS-Test	WCMS Test I
	202	202		<input checked="" type="checkbox"/>	CO-99-99991	Bldg 2	WCMS-Test	WCMS Test I

- Edit – Used to edit the Bedroom Size, Unit Type, or unit Square Footage. (page 14, Figure 16)
- Cert Actions – Allows you to select a certification action of either "Create Certification" or "Modify Current Certification", based upon the action that is appropriate for that unit. This will be covered in the Tenant Page Features section. (page 14, Figure 17)

## Unit Page Features (continued)

Edit:

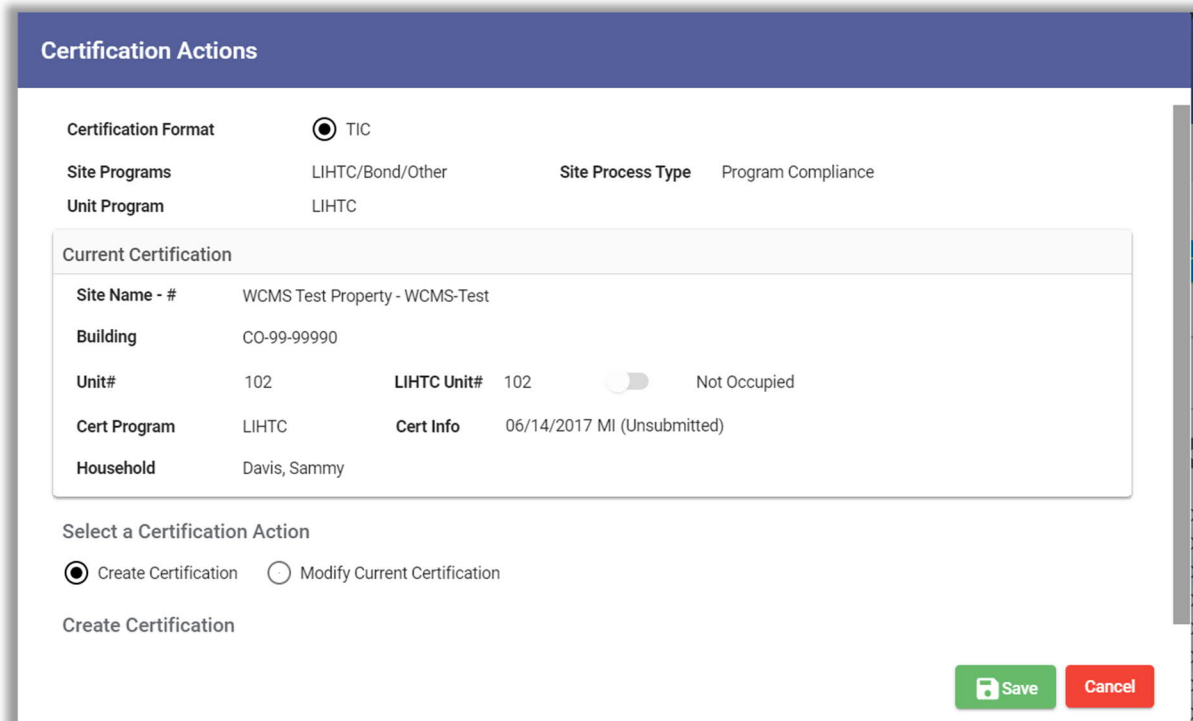
Figure 16



The screenshot shows the 'Unit' page for 'WCMS Test Property | CO-99-99990 | 102, LIHTC # 102'. The page has tabs for 'Details', 'Email', and 'Files'. The 'Details' tab is active, showing a 'General Information' section with a 'Unit Number \*' field containing '102'. To the right is the 'Unit Characteristics' section, which includes a 'Status' area with checkboxes for 'Archived', 'Inactive', and 'Out-of-Service' for 'Site', 'Bldg', and 'Unit'. Below this are fields for 'Bedroom Size \*' (2), 'Unit Type \*' (2 bedrooms), and 'Square Footage \*' (1000). A 'Save' button is visible in the top right corner.

Cert Actions:

Figure 17



The screenshot shows the 'Certification Actions' page. It features a 'Certification Format' section with a radio button selected for 'TIC'. Below this are 'Site Programs' (LIHTC/Bond/Other) and 'Unit Program' (LIHTC). The 'Site Process Type' is set to 'Program Compliance'. A 'Current Certification' section displays details for 'WCMS Test Property - WCMS-Test', including 'Building' (CO-99-99990), 'Unit#' (102), 'LIHTC Unit#' (102), 'Cert Program' (LIHTC), and 'Household' (Davis, Sammy). A toggle switch for 'LIHTC Unit#' is currently turned off, with the text 'Not Occupied' next to it. The 'Cert Info' shows '06/14/2017 MI (Unsubmitted)'. At the bottom, there is a 'Select a Certification Action' section with radio buttons for 'Create Certification' (selected) and 'Modify Current Certification'. A 'Create Certification' label is positioned below the radio buttons. In the bottom right corner, there are 'Save' and 'Cancel' buttons.

Reports tab:

Currently, there are no reports available under the Unit's Reports tab.

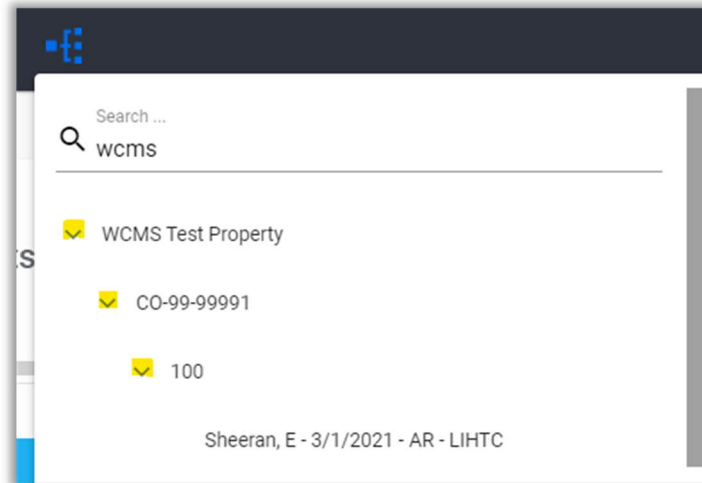
## ❖ Tenant Page Features

To navigate to the Tenant page, you can either click "Tenant" from the left-navigation menu or select a tenant certification from the tree icon. Selecting a tenant certification from the Tree icon will open the certification in "Edit" mode.



To select a Tenant certification from the tree icon, first click the "carrots" to the left of the Site name, building number, and unit number to expand the view. Then, click on the desired Tenant Certification to select it (Figure 18)

Figure 18



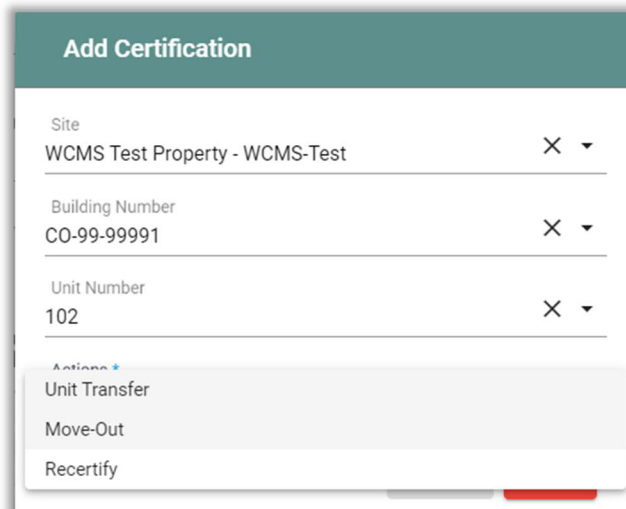
### Adding a Tenant Certification:

To add a new certification to the specific unit, click the blue "+ Certification" at the top, right of the Tenant page.

+ Certification

Depending upon the status of the unit (occupied vs. unoccupied) and the previous certification type, the system will provide a drop-down list of appropriate Actions in the "Add Certification" window (Figure 19):

Figure 19



## Tenant Page Features (continued)

The tenant page has three tabs at the top: Search, Reports and XML Tenant Upload.

### Search tab:

When navigating to the Tenant screen, the Search tab is the default view. Users can do a simple search from this screen, filtering any search results by “Current MF Tenants” (default), “All” tenants, or “Current S8 Tenants”.

For more robust searching, you can click on the blue Advanced Search button and enter other criteria (Figure 20), such as:

- Program (HUD MF or LIHTC)
- BIN
- Building Name
- Site Number
- Site Process Type
- Site Programs

Once you have entered the appropriate criteria, click the looking glass icon.



Figure 20




The screenshot shows the 'Tenant' page with three tabs: 'Search', 'Reports', and 'XML Tenant Upload'. The 'Search' tab is active. The interface includes a header with the 'Tenant' logo and a '+ Certification' button. Below the tabs, there is a search form with the following fields and options:

- Certs Filter:** Radio buttons for 'All', 'Current MF Tenants' (selected), and 'Current S8 Tenants'.
- from:** Date field with '4/9/2019' and a dropdown arrow.
- to:** Date field with '4/9/2021' and a dropdown arrow.
- Site Name:** Text input field with 'Select...' placeholder and a dropdown arrow.
- First Name, Last Name, Unit Number:** Text input fields.
- Program:** Radio buttons for 'HUD MF' and 'LIHTC'.
- BIN, Building Name, Site Number:** Text input fields.
- Site Process Type:** Text input field with 'Select...' placeholder and a dropdown arrow.
- Site Programs:** Text input field with 'Select...' placeholder.
- Display Archived Sites:** A checkbox.
- Advanced Search:** A blue button with a magnifying glass icon, 'Advanced Search' text, and an upward arrow. Below it is a 'Clear' link.



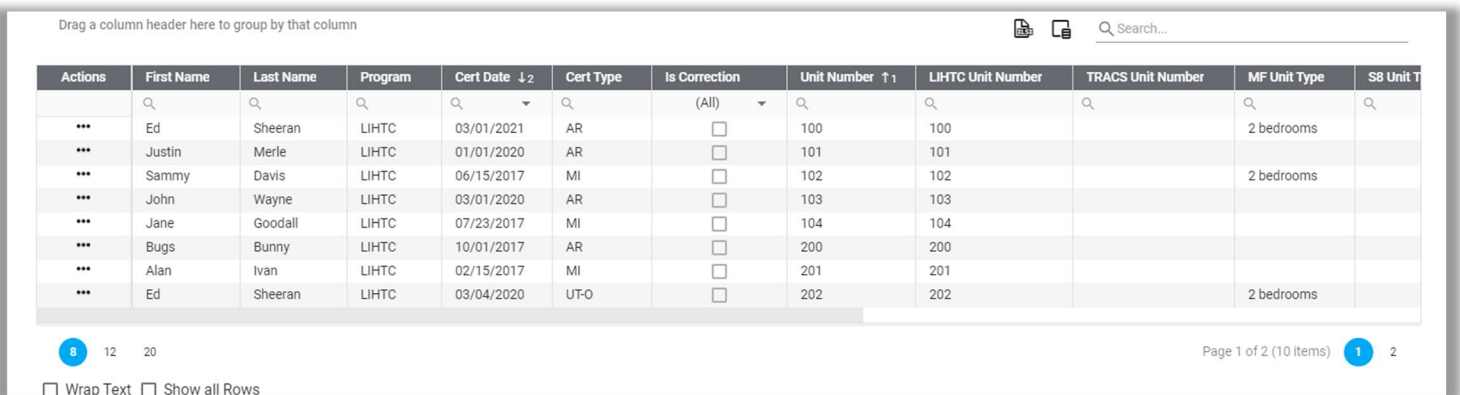
## Tenant Page Features (continued)

Upon clicking the looking glass icon, the system will provide a list of matching tenants in a grid (Figure 21). Use the grid in the following ways to edit the way you view the data:

- Click on column headers to sort by specific columns. For instance, clicking on the Last Name heading will sort the search results in ascending or descending last name order.
- Click on the Column Chooser icon  to open that window, then drag column headers there that are not needed.
- Click on the Export all data icon  to export the search results to Excel.
- Just below the header row, you will see a smaller looking glass at the top of each column . You can use this icon to filter your data as you want. For instance:
  - Hover your mouse over the looking glass to select the filter criteria
  - Once you have selected the filter criteria, type in the field to the right of the looking glass. For example, if I only wanted to see "AR" cert types, I would select the filter criteria of "Contains", then type AR in the field just below the Cert Types heading. The result will show only the tenants who had an AR.
- To group your data by a specific column, click on the column header of your choice and drag it to the area above the grid.

Specific actions can be done from the tenant grid, by clicking the three dots (...) to the left of the tenant name, under the Actions column header (Figure 21):

Figure 21



Drag a column header here to group by that column

Actions	First Name	Last Name	Program	Cert Date ↓	Cert Type	Is Correction	Unit Number ↑	LIHTC Unit Number	TRACS Unit Number	MF Unit Type	SB Unit T
...	Ed	Sheeran	LIHTC	03/01/2021	AR	<input type="checkbox"/>	100	100		2 bedrooms	
...	Justin	Merle	LIHTC	01/01/2020	AR	<input type="checkbox"/>	101	101			
...	Sammy	Davis	LIHTC	06/15/2017	MI	<input type="checkbox"/>	102	102		2 bedrooms	
...	John	Wayne	LIHTC	03/01/2020	AR	<input type="checkbox"/>	103	103			
...	Jane	Goodall	LIHTC	07/23/2017	MI	<input type="checkbox"/>	104	104			
...	Bugs	Bunny	LIHTC	10/01/2017	AR	<input type="checkbox"/>	200	200			
...	Alan	Ivan	LIHTC	02/15/2017	MI	<input type="checkbox"/>	201	201			
...	Ed	Sheeran	LIHTC	03/04/2020	UT-O	<input type="checkbox"/>	202	202		2 bedrooms	

12 20

Page 1 of 2 (10 items) 1 2

Wrap Text  Show all Rows

- Edit – Opens the current certification record (page 18, Figure 22)
- Cert Actions – Allows you to select a certification action of either "Create Certification" or "Modify Current Certification", based upon the action that is appropriate for that unit. (pages 18-19, Figures 23 and 24)

## Tenant Page Features (continued)



If a certification was entered for a unit but not submitted, the “Create Certification” will not be available. Instead, the “Modify Current Certification” will offer the option of either “Submit” or “Delete”. Similarly, if the last cert was submitted, the system will offer the option to “Create Certification” and provide certification types that are appropriate, or “Modify Current Certification” to correct or unsubmit the cert.

Edit:

Figure 22

The screenshot shows a web application interface for tenant certification. The header includes a search icon, a user profile icon, and the text "Certification LIHTC - 3/1/2021 AR Sheeran Ed". Below the header, there are tabs for "Details", "Email", and "Files". The main content area is divided into sections: "Summary", "Cert Information", "Member Financials", and "Other Programs". The "Summary" section displays household information: Household Members (2), Move-In Date (05/06/2017), Number of Bedrooms (1), Dependents Under 18 (0), Full-Time Students (0), Household Type (Family), Social Services (Single-Parent Household: No, Disabled Household: No, Occupants 62 and Over: 0). On the right side, there are buttons for "Units", "Certs", and "Priors".

Cert Actions – Create Certification:

Figure 23

The screenshot shows the "Certification Actions" modal form. It includes the following fields and options:

- Certification Format:** TIC (selected)
- Site Programs:** LIHTC/Bond/Other
- Site Process Type:** Program Compliance
- Unit Program:** LIHTC
- Current Certification:**
  - Site Name - #: WCMS Test Property - WCMS-Test
  - Building: CO-99-99991
  - Unit#: 102, LIHTC Unit#: 102, Occupied (checked)
  - Cert Program: LIHTC, Cert Info: 06/15/2017 MI (Submitted)
  - Household: Davis, Sammy
- Select a Certification Action:** Create Certification (selected), Modify Current Certification
- Create Certification:**
  - Certification Type: AR, IR, UT, MO (all unselected)
  - Effective Date \* (calendar icon)
- Buttons:** Save, Cancel

## Tenant Page Features (continued)

Cert Actions – Modify Current Certification:

Figure 24

The screenshot displays the 'Certification Actions' interface. At the top, the 'Certification Format' is set to 'TIC'. Below this, 'Site Programs' are listed as 'LIHTC/Bond/Other' and 'Site Process Type' as 'Program Compliance'. The 'Unit Program' is 'LIHTC'. A section titled 'Current Certification' provides details for 'WCMS Test Property - WCMS-Test', including building 'CO-99-99991', unit '102', and 'LIHTC Unit# 102' which is currently 'Occupied'. The 'Cert Program' is 'LIHTC' and 'Cert Info' is '06/15/2017 MI (Submitted)'. The household is identified as 'Davis, Sammy'. Under 'Select a Certification Action', 'Modify Current Certification' is selected. The 'Current Certification' is '06/15/2017 MI'. Available actions include 'Correct', 'Unsubmit', and 'Delete'. 'Save' and 'Cancel' buttons are located at the bottom right.

Reports tab:

Under the Tenant screen's Reports tab (Figure 25), you will find the following reports:

- TIC Report (Tenant and Income Certification Report)
- Occupancy and Demographics Report

Figure 25

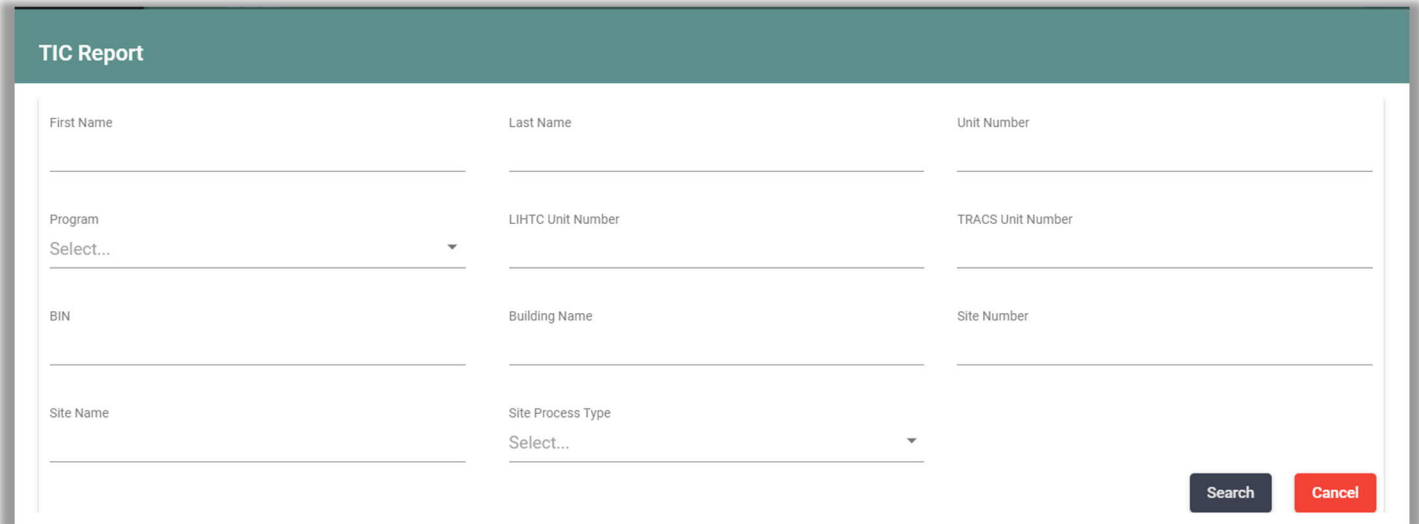
The screenshot shows the 'Tenant' screen with the 'Reports' tab selected. The 'HDS Tenant Reports' section contains buttons for 'TIC Report' and 'Occupancy and Demographics Report'. The 'Agency Tenant Reports' section includes a 'Custom Reports' dropdown menu currently set to 'HDS Current Tenants' and a 'View Report' button. A '+ Certification' button is visible in the top right corner of the tenant screen.

## Tenant Page Features (continued)

### TIC Report:

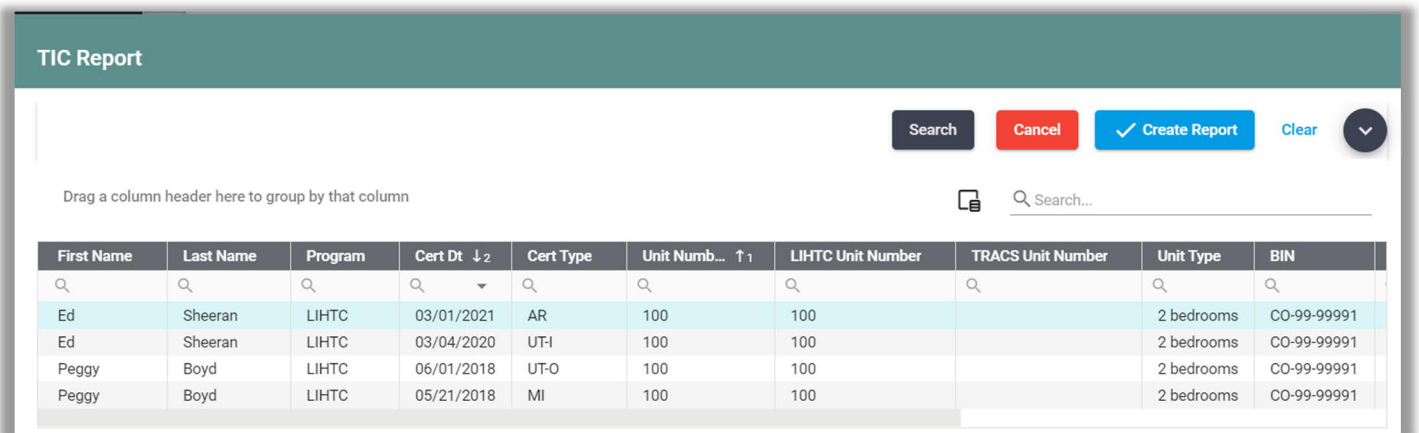
To run a tenant and income certification (TIC) report from the Reports tab, first click the TIC Report icon (see page 19, Figure 25). The system will then require you to enter one or more pieces of data to search for a specific tenant, then click "Search" (Figure 26).

Figure 26



From the search results grid, click on the tenant certification for which you wish to create a TIC report, then click the blue "Create Report" button (Figure 27).

Figure 27



First Name	Last Name	Program	Cert Dt ↓ 2	Cert Type	Unit Numb... ↑ 1	LIHTC Unit Number	TRACS Unit Number	Unit Type	BIN
Ed	Sheeran	LIHTC	03/01/2021	AR	100	100		2 bedrooms	CO-99-99991
Ed	Sheeran	LIHTC	03/04/2020	UTI	100	100		2 bedrooms	CO-99-99991
Peggy	Boyd	LIHTC	06/01/2018	UT-O	100	100		2 bedrooms	CO-99-99991
Peggy	Boyd	LIHTC	05/21/2018	MI	100	100		2 bedrooms	CO-99-99991

Tenant Page Features (continued)

The TIC will open in a new browser tab (Figure 28):

Figure 28

### TENANT INCOME CERTIFICATION

Certification Type: Recertification

Certification Date:	3/1/2021
Move-in Date:	5/6/2017

#### PART I - DEVELOPMENT DATA

Site Name: WCMS Test Property      Building: Bldg 1  
Address: 123 Main Street Denver, CO 80202      BIN#: CO-99-99991      IA: N/A  
County: Denver      Unit Number: 100      # Bedrooms: 1

#### PART II - HOUSEHOLD COMPOSITION

Last Name	First Name	Relationship	Age	Gender	Race	Ethnicity	F/T Student	SSN	Disabled?
Sheeran	Ed	Head of Household	21	Male	W		No	7547	N
Sheeran	Amy	Spouse	20	Female	A	N	No	1234	N

#### PART III - GROSS ANNUAL INCOME (USE ANNUAL AMOUNTS)

Full Name	Income Source	Amount
Ed Sheeran	Federal Wage	\$47,000.00
<b>Total Income:</b>		<b>\$47,000.00</b>

#### PART IV - INCOME FROM ASSETS

Type of Asset	Member Name	C/I	Cash Value of Asset	Annual Income from Asset
---------------	-------------	-----	---------------------	--------------------------

Occupancy and Demographics Report:

To run an Occupancy and Demographics report, first click the Occupancy and Demographics Report icon from the Tenant Reports tab (see page 19, Figure 25). The system will then require you to select the site and indicate whether you want to see "All" tenants for that site, or only "Current Tenants". Once you have made your selections, click Run. (Figure 29). For info on how to filter and export the Occupancy and Demographics report, please go to page 51.

Figure 29

### Occupancy and Demographics Report

Site Selection  
WCMS Test Property

All    Current Tenants    Include Archived

**Run**

**Close**

## Tenant Page Features (continued)

### XML Tenant Upload tab

Certain property software products can create a data file that contains your tenants' certification data. This data file, which is formatted especially for the purpose of uploading tenant data, can then be uploaded into NextGen. Uploading your monthly tenant certifications can save you time by eliminating the need to manually enter this data.

Currently, this feature is available with:

- Yardi
- Real Page's OneSite
- HAB, Inc.
- Boston Post



The new NextGen system currently accepts versions 5.0 and 6.0 only. WCMS users who were uploading files to WCMS may need to contact their property software's technical support if your product is an older version and only supports NAHMA versions 3.1 or 4.0.

Once you have determined that your property software allows you the ability to create the NAHMA XML file in version 5.0 or 6.0, there may be a few last things to consider before you attempt to upload a file:

- Has CHFA provided you the special permissions to upload your XML tenant file? If not, please contact Peggy Boyd at [pboyd@chfainfo.com](mailto:pboyd@chfainfo.com).
- Have you set up your property software to include CHFA's property number and are your BIN and Unit numbers formatted exactly as they appear in NextGen?
- In your property's software, have you entered all the activity for each tenant for the month of which you are uploading data?

If you answered "yes" to these questions, you are ready to navigate to the Tenant screen's XML Tenant Upload tab. From here, you will select the site for which you are uploading data, then click the blue "Select XML File" button to browse for your file. Once the file is attached, click the Upload File button (Figure 30).

Figure 30

The screenshot shows the 'XML Tenant Upload' tab in the NextGen system. At the top, there is a header with the 'Tenant' logo and three tabs: 'Search', 'Reports', and 'XML Tenant Upload'. Below the tabs, there is a search bar labeled 'Site Name / Site #' with the text 'WCMS Test Property' entered. Below the search bar, it says 'Supported Versions: 5.0, 6.0'. There is a blue button labeled 'SELECT XML FILE' followed by the text 'or Drop file here'. Below this, a file named '\$XMLfrancop@boulderhousing.org2a835f9-39e8-4550-99d1-052ed5faa0b6.xml' (265 kb) is listed as 'Ready to upload'. At the bottom right, there is a green button labeled 'UPLOAD FILE'.

## ❖ Manually Entering a Tenant Certification

For those of you who do not have the ability to upload your tenant data, you will be responsible for manually entering all your monthly tenant activity into NextGen. CHFA requires that all certifications for the previous month be entered into the system monthly, preferably by the 10<sup>th</sup> of the following month but no later than the end of the month. This includes:

- All new move-in certifications
- Annual re-certifications
- Unit Transfers
- Interim Certifications (only required when adding an adult to the household prior to the next annual recert)
- Move out certifications
- Initial Certifications (only used if a property has gone through substantial rehabilitation or if your property has a market-rate tenant who now qualifies for the low-income program)

If your property uses one of the software products mentioned on page 22, it is highly recommended that if you that you speak with your software's technical support to get set up to create the tenant upload file. Uploading this XML file into NextGen is much quicker and more efficient and may prevent errors in the data entered. If you have any questions, please contact Peggy Boyd at CHFA at [pboyd@chfainfo.com](mailto:pboyd@chfainfo.com).

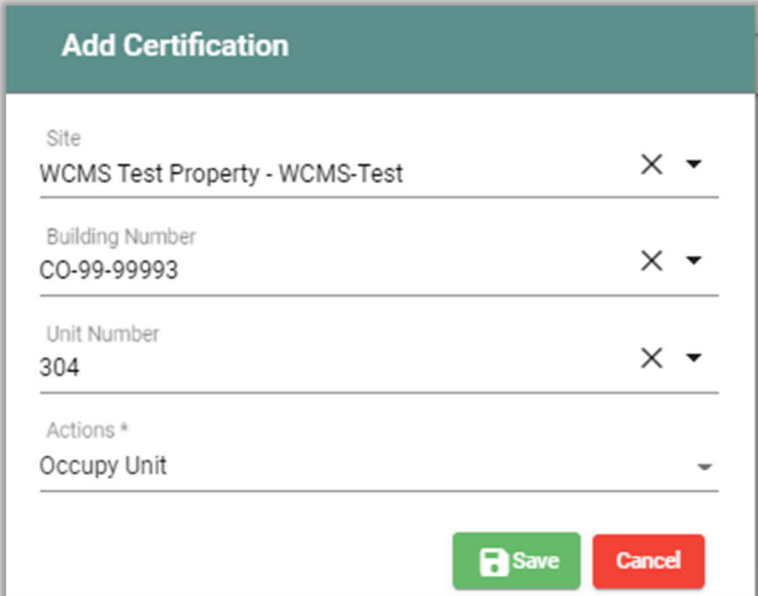
The instructions on the following pages provide the "best practices" for manually entering your tenant data. It is recommended that you follow these steps closely for each certification.

## ❖ Manually Entering a Tenant Certification: NEW MOVE-IN CERTIFICATIONS

To enter a new Move-in:

1. Navigate to the Tenant screen, using the left-navigation menu.
2. Click on the blue "+ Certification" button in the upper right-hand portion of the screen.
3. Select the Site, Building Number and Unit Number for which the new move-in record will be entered. (Figure 31)
4. Once the unit number is selected, select an "Action" from the drop-down list.
  - If you are entering a new Move-in and "Occupy Unit" is not an option, you will need to go back to the unit's most recent certification and ensure that a move-out or unit transfer-out is entered and submitted for the previous household.
5. Click "Save".

Figure 31



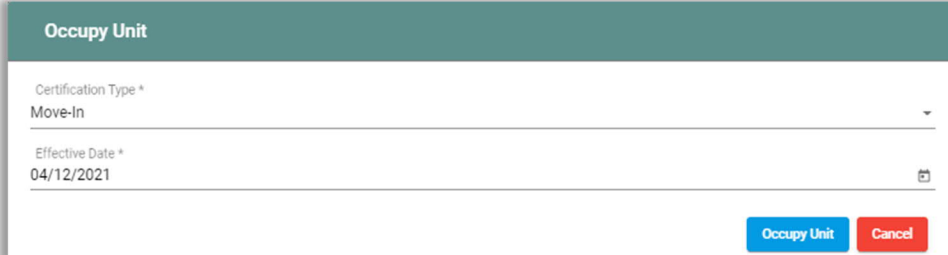
The screenshot shows a form titled "Add Certification" with a teal header. It contains four input fields, each with a dropdown arrow and an 'X' icon for clearing the field:

- Site: WCMS Test Property - WCMS-Test
- Building Number: CO-99-99993
- Unit Number: 304
- Actions \*: Occupy Unit

At the bottom right, there are two buttons: a green "Save" button with a floppy disk icon and a red "Cancel" button.

6. Once the "Occupy Unit" window opens, select "Move-in" from the "Certification Type" drop-down and enter the date that the tenant moved into the property ("Effective Date"). Click the blue "Occupy Unit" button (Figure 32).

Figure 32



The screenshot shows a form titled "Occupy Unit" with a teal header. It contains two input fields:

- Certification Type \*: Move-In
- Effective Date \*: 04/12/2021

At the bottom right, there are two buttons: a blue "Occupy Unit" button and a red "Cancel" button.

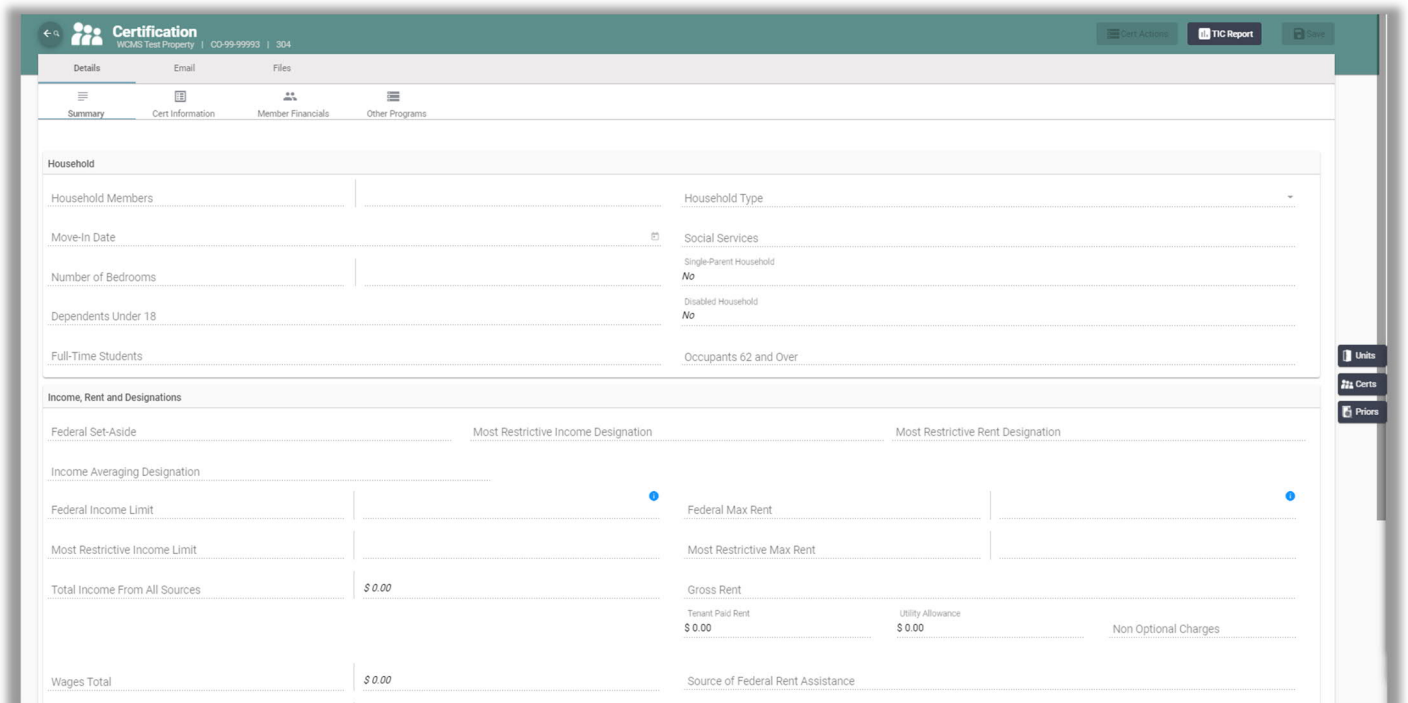


## Manually Entering a Tenant Certification: NEW MOVE-IN CERTIFICATIONS (continued)

Upon clicking the "Occupy Unit" button, NextGen will open a blank Certification window in the Summary view (Figure 33).

 Please note that no data is entered on the Summary screen; this screen will eventually summarize all the data entered in the Cert Information and Member Financials screens.

Figure 33



7. Click on the Cert Information screen to start entering the details of your new Move-in, making sure to enter data into the following fields. Any fields that are not mentioned below should be skipped.

 For ease of entering data, it is recommended that you use your "tab" key to move from one field to the next.

### Certification Information Section

- Self-certification: Yes or No
- Original Effective Date: Should match the move-in Effective Date
- Household Type: Select the type which best matches the tenant's household
- Employment Type: Select the type which best matches the head of household's employment
- Unit Type: Select from EMP (employee), LI (low-income), or MKT (Market)
- Utility Type: Select the best option depending on whether your household has a utility allowance
- Single-Parent Household: Yes or No
- All Student Household: Yes or No
- Student Use Code: Used for Student households

## Manually Entering a Tenant Certification: NEW MOVE-IN CERTIFICATIONS (continued)

### Recent Income Certification Details

- Effective Date of Most Recent Income Certification: This is populated when income is not certified, For example, a self-certification
- Household Size at Most Recent Income Certification: This is populated when income is not certified, For example, a self-certification

### Qualification Details (only required if property has low-income housing tax credits/LIHTC)

- LIHTC Qualification Date: Enter the same date as move-in effective date.
- Household Income at Most Recent Qualification Date: Total income for the household
- Household Size at Most Recent Qualification Date: Total number of occupants in the household

### Income, Rent and Designations

- Most Restrictive Income\*: Select the proper AMI% from the drop-down as designated for the household
- Most Restrictive Rent\*: Select the proper AMI% from the drop-down, should match the previous field
- Income Averaging Designation: Only used for properties who selected Income Averaging upon allocation
- Federal Income Limit: Automatically calculated by the system
- Most Restrictive LIHTC Income Limit: The most restrictive rental set-aside percentage currently applied to the household. This value may be the same as or less than the Federal Income Designation amount. The values are populated from the Unit Type reference table in the Windows application
- Annual Income: Total income for the household
- Federal Rent Limit: Automatically calculated by the system
- Most Restrictive LIHTC Rent: The most restrictive rental set-aside percentage currently applied to the household. This value may be the same as or less than the Federal Income Designation amount. The values are populated from the Unit Type reference table in the Windows application
- Tenant Rent: The portion of the rent that the tenant is responsible for paying, per month
- Utility Allowance: Utility Allowance Amount, if applicable
- Non-Optional Charges: The amount of non-optional charges, such as mandatory garage rent, storage lockers, charges for services provided by the development

### Assistance (may be skipped if household does not receive any source of rental assistance)

- Sources of Federal Rent Assistance: Select the most-appropriate option, if applicable
- Federal Rent Assistance Amount: Enter the amount of Federal Rent Assistance received, if applicable
- Source of Other Non-Federal Rent Assistance: Enter source of assistance, if applicable (e.g. Church)
- Other Non-Federal Rent Assistance Amount: Enter the amount of non-federal assistance received, if applicable
- Total Monthly Rent Assistance: Enter the total amount of monthly assistance received, if applicable

## Manually Entering a Tenant Certification: NEW MOVE-IN CERTIFICATIONS (continued)

### Certification Totals

- Wages Total: The sum of income types B = Business, F = Federal Wage, M = Military Wage, and W = Non-Federal Wage
- Social Sec Total: The sum of income types PE = Pensions, SI = Supplemental Security Income, and SS = Social Security
- Public Assist Total: The sum of income types T = TANF (Formerly AFDC) and G = General Assistance
- Other Total: The sum of income types CS = Child Support, I = Indian Trust, N = Other Non-Wage Source, and U = Unemployment
- Asset Cash Value Total: Enter the total cash value of assets, if applicable
- Annual Asset Income Total: If income is earned from assets, enter total annual income from assets

8. Click on the Member Financials screen to start entering your household members, making sure to enter data into the following fields. Any fields that are not mentioned below should be skipped.



For ease of entering data, it is recommended that you use your “tab” key to move from one field to the next.

### New Member’s Details

Click the blue “+” to add a household member (it is recommended that you begin with the Head of Household)



Any field with an asterisk (\*) next to it is a required field:

- First Name\*
- Middle Name
- Last Name\*
- Relationship\*: Select from drop-down the appropriate relationship, ensuring that each household has one Head of Household
- Last 4 SSN\*
- Alien Registration Number: If applicable; be sure to include the “A” at the beginning of the number
- Races\*: Select from drop-down
- Birth Date\*: If an unborn child will be part of the household, enter the expected due date
- Marital Status: Select from drop-down
- Ethnicity: Select all choices from drop-down
- Gender\*: Select from drop-down
- Special Status: Be sure to indicate if member is disabled, elderly, a joint custody parent, or Student
- Disabled: Missing, No, Tenant Declined to Respond, or Yes
- LIHTC Student: Required if this is a LIHTC household and the member is a student
- Occupation\*: Select from drop-down
- Source of Income\*: Select from drop-down

Once all information is entered, click the blue “Add to Member List” button.

Add to Member List



Repeat for all members of the household and then continue to the Income and Assets section of the Member Financials screen.



Click the green “Save” button in the top, right-hand portion of the screen before continuing.

Save

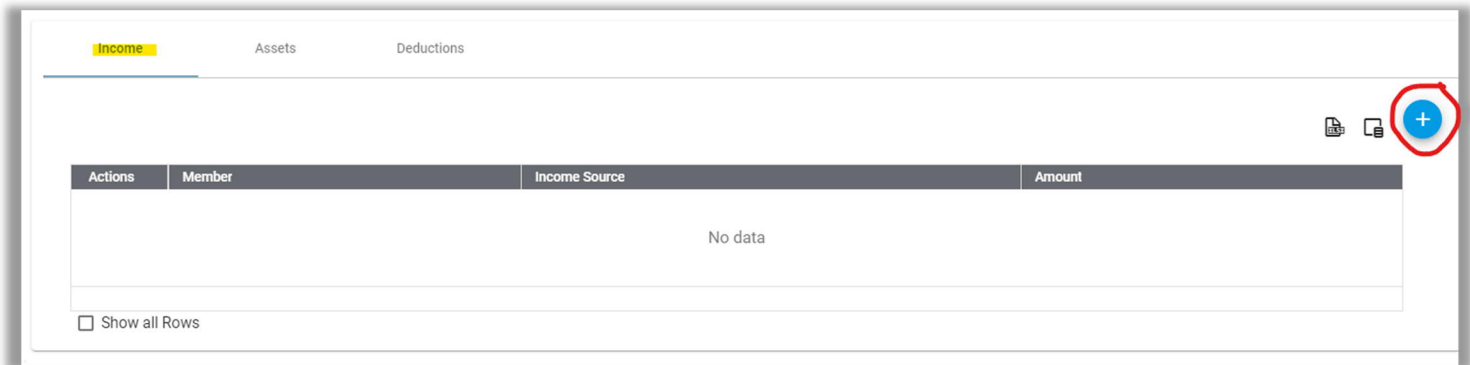
## Manually Entering a Tenant Certification: NEW MOVE-IN CERTIFICATIONS (continued)

- Just below the household member's details, you will see three areas: Income, Assets, and Deductions. For the remaining instructions, click on the section indicated and then enter data into the fields indicated.

### Income

To get started, first click the blue "+" on the bottom right portion of the screen, just above the grid (Figure 34).

Figure 34



To the right of the Income grid, you will see new data entry fields appear. If you cannot see the fields, you may need to decrease your browser window's zoom or move the scroll bar to the right. (Figure 35)

Figure 35

- Select the appropriate household Member\* and Income Type\* from the drop-downs, then enter the annual income. Click the green "Save" button when finished.

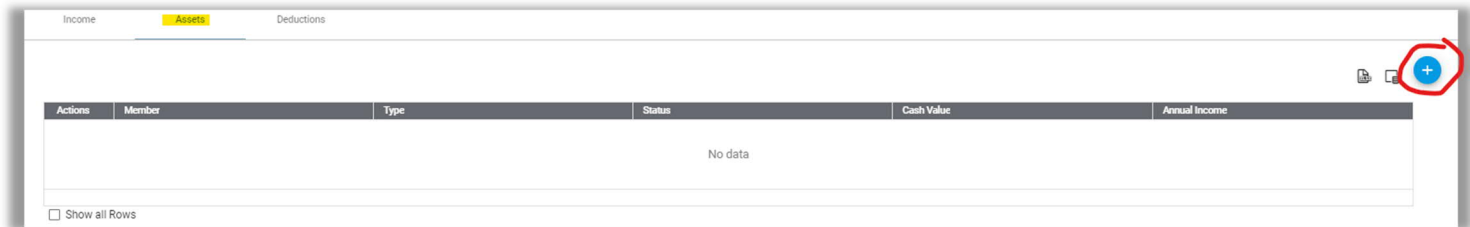


## Manually Entering a Tenant Certification: NEW MOVE-IN CERTIFICATIONS (continued)

### Assets

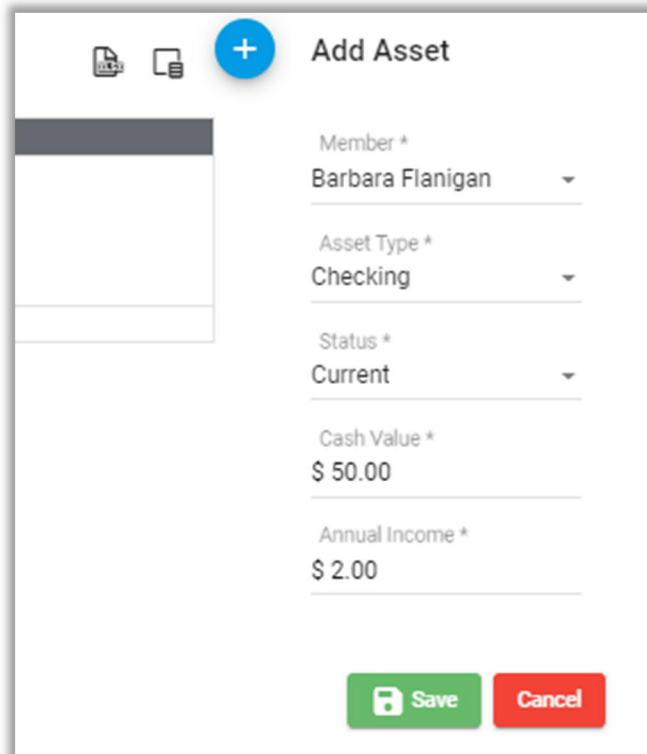
To enter the household's Assets, click the blue "+" on the bottom right portion of the screen, just above the grid (Figure 36).

Figure 36



 To the right of the Asset grid, you will see new data entry fields appear. If you cannot see the fields, you may need to decrease your browser window's zoom or move the scroll bar to the right. (Figure 37)

Figure 37



**Add Asset**

Member \*  
Barbara Flanigan

Asset Type \*  
Checking

Status \*  
Current

Cash Value \*  
\$ 50.00

Annual Income \*  
\$ 2.00

- Select the appropriate household Member\*, Asset Type\*, and Status\* from the drop-down options, then enter the Cash Value\* and Annual Income\* from the assets. Click the green "Save" button when finished.



## Manually Entering a Tenant Certification: NEW MOVE-IN CERTIFICATIONS (continued)

10. Before leaving the Member Financials screen, be sure to view the Members Summary, Income Summary and Asset Summary sections (Figure 38):

Figure 38

Members Summary	
Family Members	2
Adults with Income	1
Dependents Under 18	1
Occupants 62 and Over	0
Student Head of Household	Yes
Full-Time Students	1
Disabled Household	No

Income Summary	
Total Income	\$25,000.00
Total Asset Income	\$2.00
Total Income from all Sources	\$25,002.00

Asset Summary	
Total Asset	\$50.00
Total Asset Income	\$2.00



**BEST PRACTICE:** Before continuing, it is recommended that you navigate back to the "Cert Information" screen and double-check all your entries before submitting your certification (next step).


11. Once you have entered your move-in and verified all your household member, income and asset data, you must Submit your certification. **DO NOT FORGET THIS STEP**, as it will prevent you from entering any subsequent certification data for this household.
  - Click the blue "Cert Actions" button at the top portion of the certification screen. 
  - A new "Certification Actions" window will appear (page 31, Figure 39) and you will notice that the "Cert Info" field will show the cert as "Unsubmitted".
  - Click the "Modify Current Certification" radio button, then click the blue "Submit" button.
    - If you are not yet ready to submit the cert, you can choose "Cancel" or you can "Delete" the cert.

Figure 39

**Certification Actions**

Certification Format  TIC

Site Programs LIHTC/Bond/Other Site Process Type Program Compliance

Unit Program LIHTC

**Current Certification**

Site Name - #	WCMS Test Property -		
Building	CO-99-99993		
Unit#	304	LIHTC Unit#	<input checked="" type="checkbox"/> Occupied
Cert Program	LIHTC	Cert Info	04/12/2021 MI (Unsubmitted)
Household	Flanigan, Barbara		

Select a Certification Action

Create Certification  Modify Current Certification

**Modify Current Certification**


Current Certification 04/12/2021 MI

Available Action(s)

- Upon clicking “Submit” the system will confirm whether you wish to change the certification status to Submitted (Figure 40). Click “Yes” or “No”.
- Similarly, if you choose to Delete the certification, the system will confirm whether you want to delete.

Figure 40

**Confirm Status Change**

 Change certification status to Submitted?

## Manually Entering a Tenant Certification: NEW MOVE-IN CERTIFICATIONS (continued)

12. Once you have submitted your new Move-in record, you will see that the system now provides you new actions, Correct, Unsubmit, or Delete (Figure 41). If you do not wish to perform any of these actions, simply click the green "Save" button.

Figure 41

### Certification Actions

<b>Certification Format</b>	<input checked="" type="radio"/> TIC		
<b>Site Programs</b>	LIHTC/Bond/Other	<b>Site Process Type</b>	Program Compliance
<b>Unit Program</b>	LIHTC		

#### Current Certification

<b>Site Name - #</b>	WCMS Test Property -		
<b>Building</b>	CO-99-99993		
<b>Unit#</b>	302	<b>LIHTC Unit#</b>	302 <input checked="" type="checkbox"/> Occupied
<b>Cert Program</b>	LIHTC	<b>Cert Info</b>	03/01/2021 AR (Submitted)
<b>Household</b>	Smith, Bobby		

Select a Certification Action

Create Certification  Modify Current Certification

#### Modify Current Certification

<b>Current Certification</b>	03/01/2021	AR
------------------------------	------------	----

Available Action(s)



## Manually Entering a Tenant Certification: NEW MOVE-IN CERTIFICATIONS (continued)



**BEST PRACTICE:** Often times, we find that it is necessary to make changes to a certification that has been entered into the system. Please use the following “best practices” for using the certification actions of Unsubmit (then editing a record) or Correct:

### Unsubmit:

- Used to “unlock” a certification that has already been entered/submitted to edit the record to fix an error of data that was recently entered, such as:
  1. The wrong effective date or move-in date was entered for a household
  2. Rent, income or assets were entered incorrectly
  3. The name of a member was misspelled
  4. The SSN or Date of Birth was entered incorrectly
- Can also be used to “unlock” a certification, so the record can be deleted.

### Correct:

Used when the tenant notifies you of a correction to their household data after it has already been entered into the system.

### Delete:

A record should only be deleted under the following circumstances:

1. The household certification was entered into the wrong unit.
2. A household who had already been recertified has moved out of the property, prior to the date of the recertification.



CHFA can run audit reports on all data that has been altered. Using the Unsubmit certification action to edit or delete a record that has been entered should only be done within the same month that the record was entered into the system. Contact your CHFA Program Compliance officer for guidance on altering any data that was entered in prior months. Abuse of this functionality may result in the loss of access to the NextGen system.

## ❖ Manually Entering a Tenant Certification: ANNUAL or INTERIM RECERTIFICATIONS

To enter a new Annual or Interim Recertification:

1. Enter search criteria into the Tenant screen to pull up the tenant certs for a specific Site Name and Unit Number (Figure 42). Be sure that your search is filtered to show “Current MF Tenants”.
2. Under the search results grid, scroll right to the Status column to ensure that the prior certification is “Submitted”.
  - If so, continue to step #3.
  - If not, you will first need click the three dots under the Actions column and select “Cert Actions”, then “Modify Current Certification” and then click “Submit” and “Save”. Then, continue to step #3.

Figure 42

The screenshot displays the 'Tenant' search interface. At the top, there are tabs for 'Search', 'Reports', and 'XML Tenant Upload'. A search filter section includes radio buttons for 'All', 'Current MF Tenants' (selected), and 'Current S8 Tenants'. It also features date pickers for 'from' (4/12/2019) and 'to' (4/12/2021), and a 'Site Name' dropdown set to 'WCMS Test Property - WCMS-Test'. Below this, there are input fields for 'First Name', 'Last Name', and 'Unit Number' (302), along with an 'Advanced Search' button and a 'Clear' link. The main area contains a table with the following data:

Actions	First Name	Last Name	Program	Cert Date ↓ 2	Cert Type	Unit Number ↑ 1	LIHTC Unit Number	BIN	Building Name	Site Name	Date Entered ↓ 3	Status
...	Bobby	Smith	LIHTC	03/01/2020	MI	302	302	CO-99-99993	Bldg 3	WCMS Test Property	03/04/2020	Submitted

At the bottom of the table, there are pagination controls showing '12' items and '20' items per page, and a 'Page 1 of 1 (1 Items)' indicator. There are also checkboxes for 'Wrap Text' and 'Show all Rows'.

3. In the Tenant search results grid, click the three dots “...” under the Action column header.
4. Select “Cert Actions”.
5. On the Certification Actions screen, click the “Create Certification” radio button. (page 35, Figure 43)
6. Select the appropriate “Certification Type” (AR or IR)
7. Enter the Effective Date.
  - For annual recertifications, the date should be the 1<sup>st</sup> day of the month that the household moved into the property. The move-in date appears on the Certification Actions screen for reference.



**BEST PRACTICE:** Before continuing, verify all the information on your Certification Actions screen.

8. Click the green “Save” button.



Figure 43

**Certification Actions**

**Certification Format**  TIC

**Site Programs** LIHTC/Bond/Other      **Site Process Type** Program Compliance

**Unit Program** LIHTC

**Current Certification**

<b>Site Name - #</b>	WCMS Test Property - WCMS-Test		
<b>Building</b>	CO-99-99993		
<b>Unit#</b>	302	<b>LIHTC Unit#</b>	302 <input checked="" type="checkbox"/> Occupied
<b>Cert Program</b>	LIHTC	<b>Cert Info</b>	03/01/2020 MI (Submitted)
<b>Household</b>	Smith, Bobby		

**Select a Certification Action**

Create Certification     Modify Current Certification

**Create Certification**

**Certification Type**     AR     IR     UT     MO

Effective Date \*  
03/01/2021

**Save**    **Cancel**

- The system will then create your new certification record. It is recommended that you review the Summary screen first, to note which fields will need updating with your new certification, paying close attention to the # of occupants, tenant rent, income and assets.
- Click on the Cert Information screen and click the "Effective Date" field. Tab through all the fields and update information, as necessary. Refer to pages 26 – 27 for entry details.
- If any edits need to be made to the household members or their income and assets, click on the Member Financials screen. Refer to pages 27 – 30 for entry details.

**!** Click the green "Save" button in the top, right-hand portion of the screen before continuing.



## Manually Entering a Tenant Certification: ANNUAL or INTERIM RECERTIFICATIONS (continued)



**BEST PRACTICE:** Before continuing, it is recommended that you navigate back to the “Cert Information” screen and double-check all your entries before submitting your certification (next step).

12. Once you have entered your annual or interim recert and verified all your household member, income and asset data, you must Submit your certification. **DO NOT FORGET THIS STEP**, as it will prevent you from entering any subsequent certification data for this household.


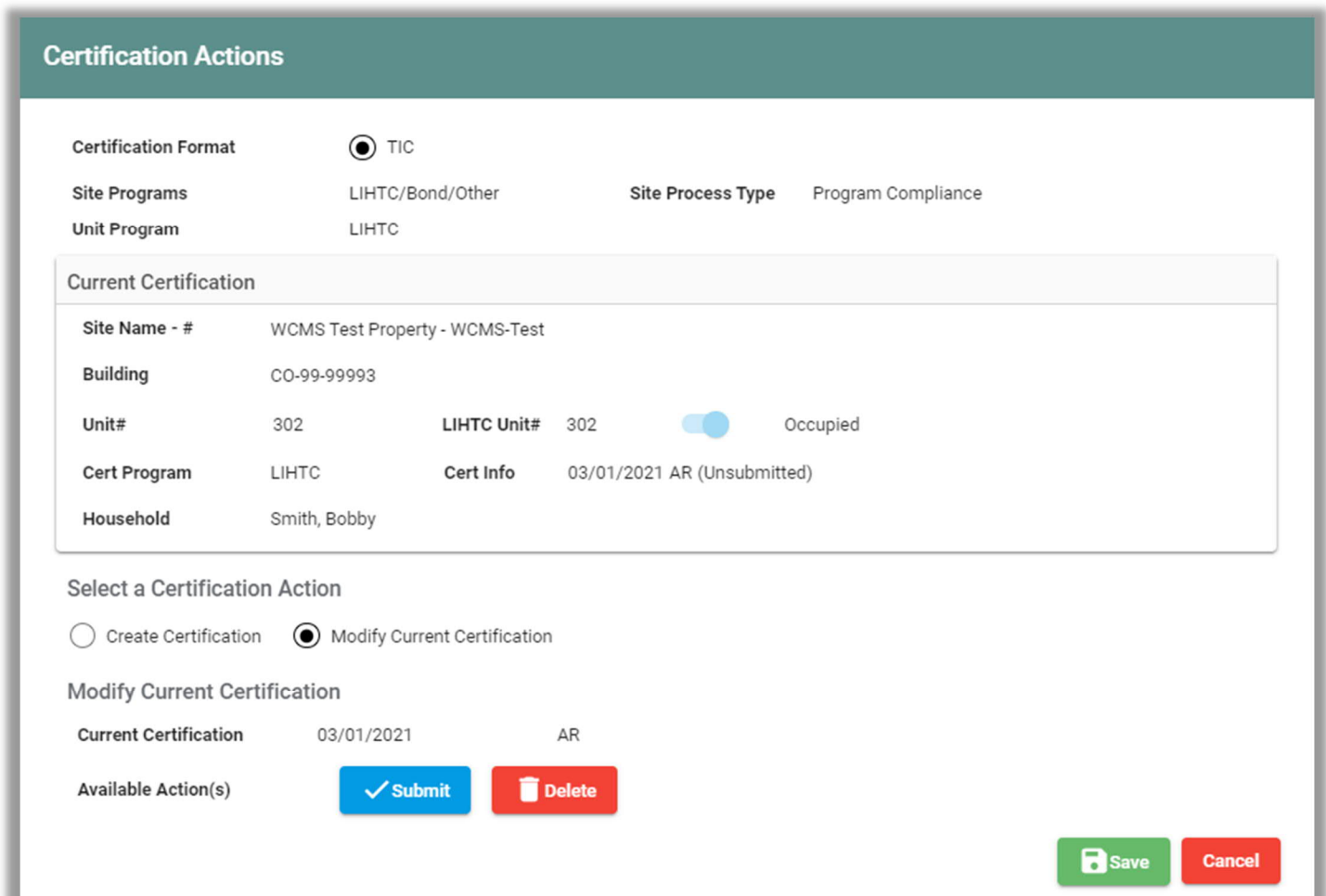
- Click the blue “Cert Actions” button at the top portion of the certification screen. 
- A new “Certification Actions” window will appear (see Figure 44; you will notice that the “Cert Info” field will show the cert as “Unsubmitted”).
- Click the “Modify Current Certification” radio button, then click the blue “Submit” button.
  - If you are not yet ready to submit the cert, you can choose “Cancel” or you can “Delete” the cert.

Figure 44



**Certification Actions**

Certification Format  TIC

Site Programs LIHTC/Bond/Other      Site Process Type Program Compliance

Unit Program LIHTC

**Current Certification**

Site Name - #	WCMS Test Property - WCMS-Test		
Building	CO-99-99993		
Unit#	302	LIHTC Unit#	302 <input checked="" type="checkbox"/> Occupied
Cert Program	LIHTC	Cert Info	03/01/2021 AR (Unsubmitted)
Household	Smith, Bobby		

Select a Certification Action

Create Certification     Modify Current Certification

**Modify Current Certification**

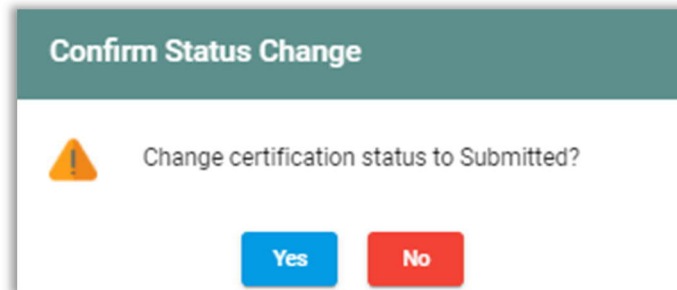
Current Certification    03/01/2021    AR

Available Action(s)

## Manually Entering a Tenant Certification: ANNUAL or INTERIM RECERTIFICATIONS (continued)

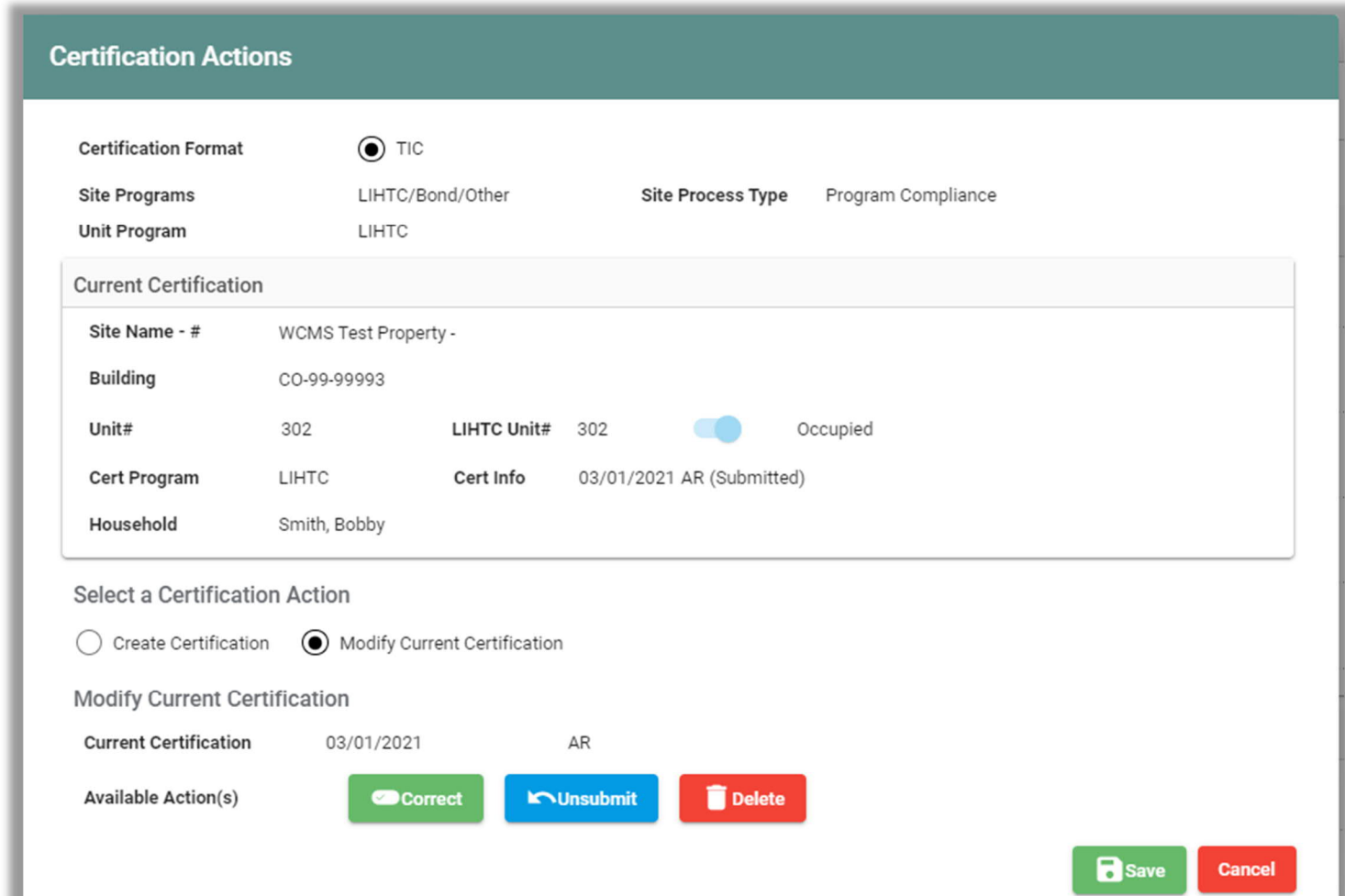
- Upon clicking "Submit" the system will confirm that you wish to change the certification status to Submitted (Figure 45).
- Similarly, if you choose to Delete the certification, the system will confirm that you want to delete.

Figure 45



13. Once you have submitted your new certification, you will see that the system now provides you new actions, Correct, Unsubmit, or Delete (Figure 46). If you do not wish to perform any of these actions, simply click the green "Save" button.

Figure 46

A screenshot of a web application interface titled "Certification Actions" with a teal header. The form contains several sections: "Certification Format" with a radio button selected for "TIC"; "Site Programs" with "LIHTC/Bond/Other" and "Site Process Type" with "Program Compliance"; "Unit Program" with "LIHTC"; "Current Certification" section with fields for "Site Name - #", "Building", "Unit#", "LIHTC Unit#", "Cert Program", "Cert Info", and "Household"; "Select a Certification Action" section with radio buttons for "Create Certification" and "Modify Current Certification" (selected); "Modify Current Certification" section with "Current Certification" date and "AR" type; "Available Action(s)" section with three buttons: "Correct" (green), "Unsubmit" (blue), and "Delete" (red); and a bottom right corner with "Save" (green) and "Cancel" (red) buttons.

Certification Format	<input checked="" type="radio"/> TIC		
Site Programs	LIHTC/Bond/Other	Site Process Type	Program Compliance
Unit Program	LIHTC		
Current Certification			
Site Name - #	WCMS Test Property -		
Building	CO-99-99993		
Unit#	302	LIHTC Unit#	302 <input checked="" type="checkbox"/> Occupied
Cert Program	LIHTC	Cert Info	03/01/2021 AR (Submitted)
Household	Smith, Bobby		
Select a Certification Action			
<input type="radio"/> Create Certification <input checked="" type="radio"/> Modify Current Certification			
Modify Current Certification			
Current Certification	03/01/2021	AR	
Available Action(s)	<input checked="" type="checkbox"/> Correct	<input type="checkbox"/> Unsubmit	<input type="checkbox"/> Delete
			<input type="checkbox"/> Save <input type="checkbox"/> Cancel

## Manually Entering a Tenant Certification: ANNUAL or INTERIM RECERTIFICATIONS (continued)



**BEST PRACTICE:** Often times, we find that it is necessary to make changes to a certification that has been entered into the system. Please use the following “best practices” for using the certification actions of Unsubmit (then editing a record) or Correct:

### Unsubmit:

- Used to “unlock” a certification that has already been entered/submitted to edit the record to fix an error that was recently made during entry, such as:
  1. The wrong effective date or move-in date was entered for a household
  2. Rent, income or assets were entered incorrectly
  3. The name of a member was misspelled
  4. The SSN or Date of Birth was entered incorrectly
- Can also be used to “unlock” a certification, so the record can be deleted.

### Correct:

Used when the tenant notifies you of a correction to their household data after it has already been entered into the system.

### Delete:

A record should only be deleted under the following circumstances:

1. The household certification was entered into the wrong unit.
2. A household who had already been recertified has moved out of the property, prior to the date of the recertification.



CHFA can run audit reports on all data that has been altered. Using the Unsubmit certification action to edit or delete a record that has been entered should only be done within the same month that the record was entered into the system. Contact your CHFA Program Compliance officer for guidance on altering any data that was entered in prior months. Abuse of this functionality may result in the loss of access to the NextGen system.

## ❖ Manually Entering a Tenant Certification: UNIT TRANSFERS

To enter a new Unit Transfer:

1. Enter search criteria into the Tenant screen to pull up the tenant certs for a specific Site Name and Unit Number (Figure 47). Be sure that your search is filtered to show "Current MF Tenants".
2. Under the search results grid, scroll right to the Status column to ensure that the prior certification is "Submitted".
  - If so, continue to step #3.
  - If not, you will first need click the three dots under the Actions column and select "Cert Actions", then "Modify Current Certification" and then click "Submit" and "Save". Then, continue to step #3.

Figure 47

The screenshot shows the 'Tenant' search interface. At the top, there are tabs for 'Search', 'Reports', and 'XML Tenant Upload'. A search filter is set to 'Current MF Tenants' with a date range from 4/12/2019 to 4/12/2021. The site name is 'WCMS Test Property - WCMS-Test'. The search results table has the following data:

Actions	First Name	Last Name	Program	Cert Date ↓ 2	Cert Type	Unit Number ↑ 1	LIHTC Unit Number	BIN	Building Name	Site Name	Date Entered ↓ 3	Status
⋮	Bobby	Smith	LIHTC	03/01/2020	MI	302	302	CO-99-99993	Bldg 3	WCMS Test Property	03/04/2020	Submitted

At the bottom of the grid, there are options for 'Wrap Text' and 'Show all Rows', and a page indicator 'Page 1 of 1 (1 items)'.

3. In the Tenant search results grid, click the three dots "..." under the Action column header.
4. Select "Cert Actions".
5. On the Certification Actions screen, click the "Create Certification" radio button. (page 40, Figure 48)
6. Select the appropriate "Certification Type" (UT)
7. Enter the "Effective Date" and select a BIN/Unit number in the "Transfer To"
  - Make sure that the unit your tenant is transferring to is vacant before starting your Unit Transfer.
  - The Unit Transfer Out and the Unit Transfer In dates will be the same in NextGen.
  - NextGen does not allow for "unit swaps" completed on the same day. Contact Peggy Boyd at [pboyd@chfainfo.com](mailto:pboyd@chfainfo.com) for more information on how to handle a unit swap.



**BEST PRACTICE:** Before continuing, verify all the information on your Certification Actions screen.

8. Click the green "Save" button.



Figure 48

**Certification Actions**

**Certification Format**  TIC

**Site Programs** LIHTC/Bond/Other      **Site Process Type** Program Compliance

**Unit Program** LIHTC

**Current Certification**

<b>Site Name - #</b>	WCMS Test Property - WCMS-Test		
<b>Building</b>	CO-99-99993		
<b>Unit#</b>	302	<b>LIHTC Unit#</b>	302 <input checked="" type="checkbox"/> Occupied
<b>Cert Program</b>	LIHTC	<b>Cert Info</b>	03/01/2021 AR (Submitted)
<b>Household</b>	Smith, Bobby		

**Select a Certification Action**

Create Certification     Modify Current Certification

**Create Certification**

**Certification Type**     AR     IR     UT     MO

**Effective Date \***    **Transfer To \***

04/05/2021

9. The system will then create your new certification record. It is recommended that you view the Summary screen first, to note which fields will need updating with your new certification, paying close attention to the # of occupants, tenant rent, income and assets.
10. Click on the Cert Information screen and click the "Effective Date" field. Tab through all the fields and update information, as necessary. Refer to pages 26 – 27 for entry details.
11. If any edits need to be made to the household members or their income and assets, click on the Member Financials screen. Refer to pages 27 – 30 for entry details.



Click the green "Save" button in the top, right-hand portion of the screen before continuing.





## Manually Entering a Tenant Certification: UNIT TRANSFERS (continued)



**BEST PRACTICE:** Before continuing, it is recommended that you navigate back to the “Cert Information” screen and double-check all your entries before submitting your certification (next step).

12. Once you have entered your unit transfer and verified all your household member, income and asset data, you must Submit your certification. DO NOT FORGET THIS STEP, as it will prevent you from entering any subsequent certification data for this household.


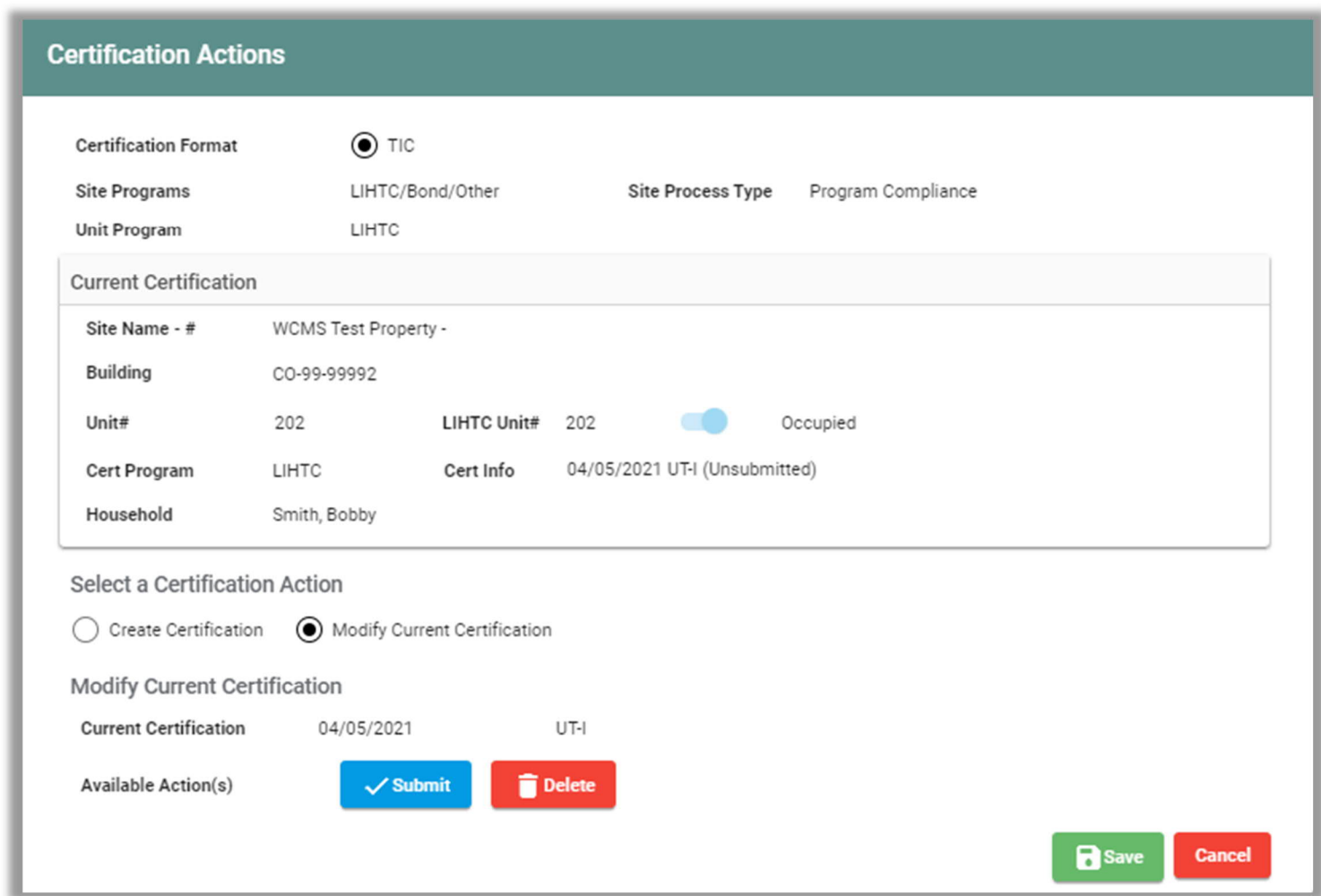
- Click the blue “Cert Actions” button at the top portion of the certification screen. 
- A new “Certification Actions” window will appear (Figure 49) and you will notice that the “Cert Info” field will show the cert as “Unsubmitted”.
- Click the “Modify Current Certification” radio button, then click the blue “Submit” button.
  - If you are not yet ready to submit the cert, you can choose “Cancel” or you can “Delete” the cert.

Figure 49



**Certification Actions**

Certification Format  TIC

Site Programs LIHTC/Bond/Other      Site Process Type Program Compliance

Unit Program LIHTC

**Current Certification**

Site Name - #	WCMS Test Property -		
Building	CO-99-99992		
Unit#	202	LIHTC Unit#	202 <input checked="" type="checkbox"/> Occupied
Cert Program	LIHTC	Cert Info	04/05/2021 UT-I (Unsubmitted)
Household	Smith, Bobby		

Select a Certification Action

Create Certification     Modify Current Certification

**Modify Current Certification**

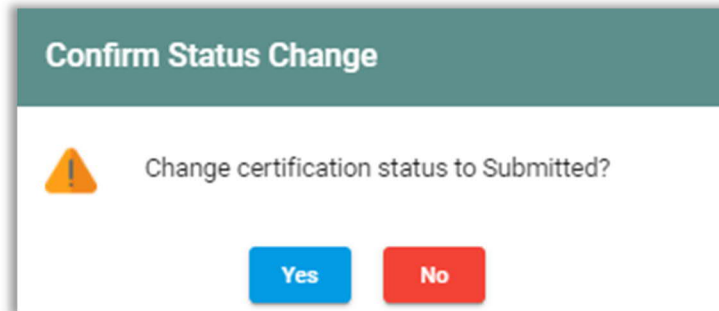
Current Certification    04/05/2021    UT-I

Available Action(s)

## Manually Entering a Tenant Certification: UNIT TRANSFERS (continued)

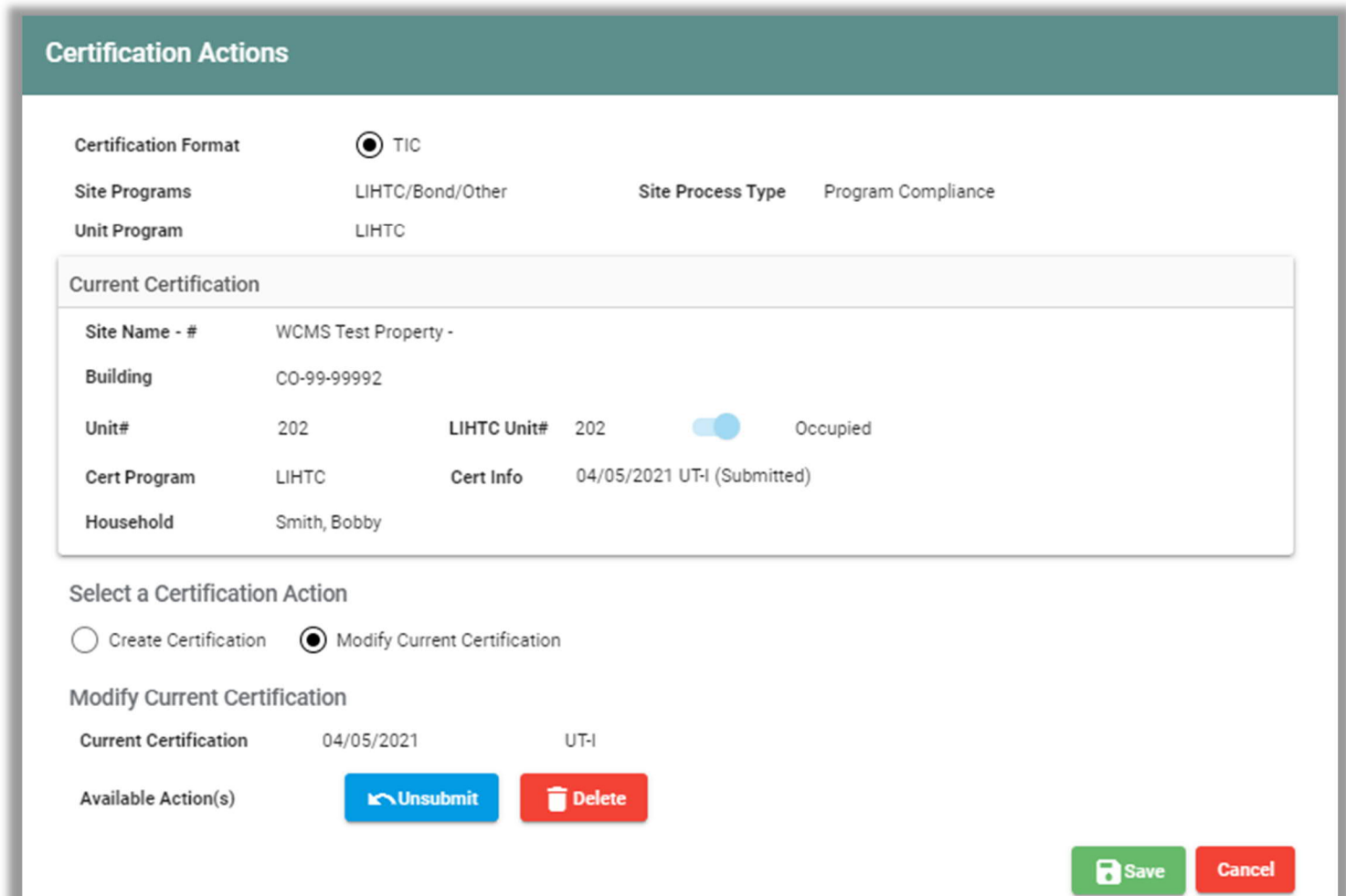
- Upon clicking “Submit” the system will confirm that you wish to change the certification status to Submitted (Figure 50).
- Similarly, if you choose to Delete the certification, the system will confirm that you want to delete.

Figure 50



13. Once you have submitted your new certification, you will see that the system now provides you new actions, Unsubmit or Delete (Figure 51). If you do not wish to perform either of these actions, simply click the green “Save” button.

Figure 51



**Certification Actions**

Certification Format  TIC

Site Programs LIHTC/Bond/Other      Site Process Type Program Compliance

Unit Program LIHTC

---

**Current Certification**

Site Name - #	WCMS Test Property -		
Building	CO-99-99992		
Unit#	202	LIHTC Unit#	202 <input checked="" type="checkbox"/> Occupied
Cert Program	LIHTC	Cert Info	04/05/2021 UT-I (Submitted)
Household	Smith, Bobby		

---

**Select a Certification Action**

Create Certification     Modify Current Certification

**Modify Current Certification**

Current Certification    04/05/2021    UT-I

Available Action(s)

## Manually Entering a Tenant Certification: UNIT TRANSFERS (continued)



**BEST PRACTICE:** Often times, we find that it is necessary to make changes to a certification that has been entered into the system. Please use the following “best practices” for using the certification actions of Unsubmit (then editing a record) or Delete:

### Unsubmit:

- Used to “unlock” a certification that has already been entered/submitted to edit the record to fix an error that was recently made during entry, such as:
  1. The wrong effective date or move-in date was entered for a household
  2. Rent, income or assets were entered incorrectly
  3. The name of a member was misspelled
  4. The SSN or Date of Birth was entered incorrectly
- Can also be used to “unlock” a certification, so the record can be deleted.

### Delete:

A record should only be deleted under the following circumstances:

1. The household certification was entered into the wrong unit.
2. A household who had already been recertified has moved out of the property, prior to the date of the recertification.



CHFA can run audit reports on all data that has been altered. Using the Unsubmit certification action to edit or delete a record that has been entered should only be done within the same month that the record was entered into the system. Contact your CHFA Program Compliance officer for guidance on altering any data that was entered in prior months. Abuse of this functionality may result in the loss of access to the NextGen system.

## ❖ Manually Entering a Tenant Certification: MOVE-OUTS

To enter a Move Out certification:

1. Enter search criteria into the Tenant screen to pull up the tenant certs for a specific Site Name and Unit Number (Figure 52). Be sure that your search is filtered to show "Current MF Tenants".
2. Under the search results grid, scroll right to the Status column to ensure that the prior certification is "Submitted".
  - If so, continue to step #3.
  - If not, you will first need click the three dots under the Actions column and select "Cert Actions", then "Modify Current Certification" and then click "Submit" and "Save". Then, continue to step #3.

Figure 52

The screenshot shows the 'Tenant' search interface. At the top, there are tabs for 'Search', 'Reports', and 'XML Tenant Upload'. Below the tabs, there are search filters: 'Certs Filter' with radio buttons for 'All', 'Current MF Tenants' (selected), and 'Current S8 Tenants'; a date range from '4/12/2019' to '4/12/2021'; and a 'Site Name' field containing 'WCMS Test Property - WCMG-Test'. There are also input fields for 'First Name', 'Last Name', and 'Unit Number' (containing '302'). An 'Advanced Search' button and a 'Clear' button are visible. Below the filters, there is a table with the following columns: Actions, First Name, Last Name, Program, Cert Date, Cert Type, Unit Number, LIHTC Unit Number, BIN, Building Name, Site Name, Date Entered, and Status. The table contains one row: Bobby Smith, LIHTC, 03/01/2020, MI, 302, 302, CO-99-99993, Bldg 3, WCMS Test Property, 03/04/2020, Submitted. At the bottom, there are pagination controls showing 'Page 1 of 1 (1 items)' and a 'Save' button.

3. In the Tenant search results grid, click the three dots "..." under the Action column header.
4. Select "Cert Actions".
5. On the Certification Actions screen, click the "Create Certification" radio button. (page 45, Figure 53)
6. Select the appropriate "Certification Type" (MO)
  - Enter the "Effective Date\*" of the move-out



**BEST PRACTICE:** Before continuing, verify all the information on your Certification Actions screen.

7. Click the green "Save" button.



Figure 53

**Certification Actions**

**Certification Format**  TIC

**Site Programs** LIHTC/Bond/Other      **Site Process Type** Program Compliance

**Unit Program** LIHTC

**Current Certification**

<b>Site Name - #</b>	WCMS Test Property - WCMS-Test		
<b>Building</b>	CO-99-99993		
<b>Unit#</b>	302	<b>LIHTC Unit#</b>	302 <input checked="" type="checkbox"/> Occupied
<b>Cert Program</b>	LIHTC	<b>Cert Info</b>	03/01/2021 AR (Submitted)
<b>Household</b>	Smith, Bobby		

**Select a Certification Action**

Create Certification     Modify Current Certification

**Create Certification**

**Certification Type**     AR     IR     UT     MO

Effective Date \*

Save
Cancel

8. Once you have entered your move out, you must Submit your certification. DO NOT FORGET THIS STEP, as it will prevent you from entering any subsequent certification data for this household.
  - Click the blue “Cert Actions” button at the top portion of the certification screen.
  - A new “Certification Actions” window will appear (page 46, Figure 54) and you will notice that the “Cert Info” field will show the cert as “Unsubmitted”.
  - Click the “Modify Current Certification” radio button, then click the blue “Submit” button.
    - If you are not yet ready to submit the cert, you can choose “Cancel” or you can “Delete” the cert.



Figure 54

### Certification Actions

**Certification Format**  TIC

**Site Programs** LIHTC/Bond/Other      **Site Process Type** Program Compliance

**Unit Program** LIHTC

#### Current Certification

<b>Site Name - #</b>	WCMS Test Property -		
<b>Building</b>	CO-99-99993		
<b>Unit#</b>	302	<b>LIHTC Unit#</b>	302 <input type="checkbox"/> Not Occupied
<b>Cert Program</b>	LIHTC	<b>Cert Info</b>	04/05/2021 MO (Unsubmitted)
<b>Household</b>	Smith, Bobby		

**Select a Certification Action**

Create Certification       Modify Current Certification

**Modify Current Certification**

**Current Certification**      04/05/2021      MO

**Available Action(s)**

## Manually Entering a Tenant Certification: MOVE OUTS (continued)



**BEST PRACTICE:** Often times, we find that it is necessary to make changes to a certification that has been entered into the system. Please use the following “best practices” for using the certification actions of Unsubmit (then editing a record) or Delete:

### Unsubmit:

- Used to “unlock” a certification that has already been entered/submitted to edit the record to fix an error that was recently made during entry, such as:
  1. The wrong effective date or move-in date was entered for a household
  2. Rent, income or assets were entered incorrectly
  3. The name of a member was misspelled
  4. The SSN or Date of Birth was entered incorrectly
- Can also be used to “unlock” a certification, so the record can be deleted.

### Delete:

A record should only be deleted under the following circumstances:

1. The household certification was entered into the wrong unit.
2. A household who had already been recertified has moved out of the property, prior to the date of the recertification.



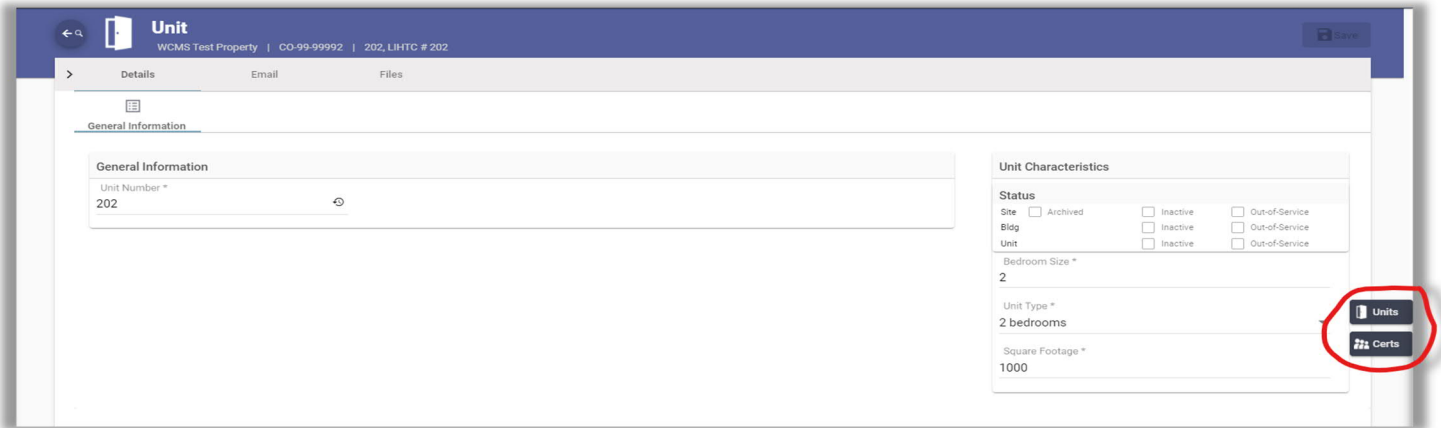
CHFA can run audit reports on all data that has been altered. Using the Unsubmit certification action to edit or delete a record that has been entered should only be done within the same month that the record was entered into the system. Contact your CHFA Program Compliance officer for guidance on altering any data that was entered in prior months. Abuse of this functionality may result in the loss of access to the NextGen system.

## ❖ NextGen: ADDITIONAL TOOLS

Additional navigational tools (from Unit screen):

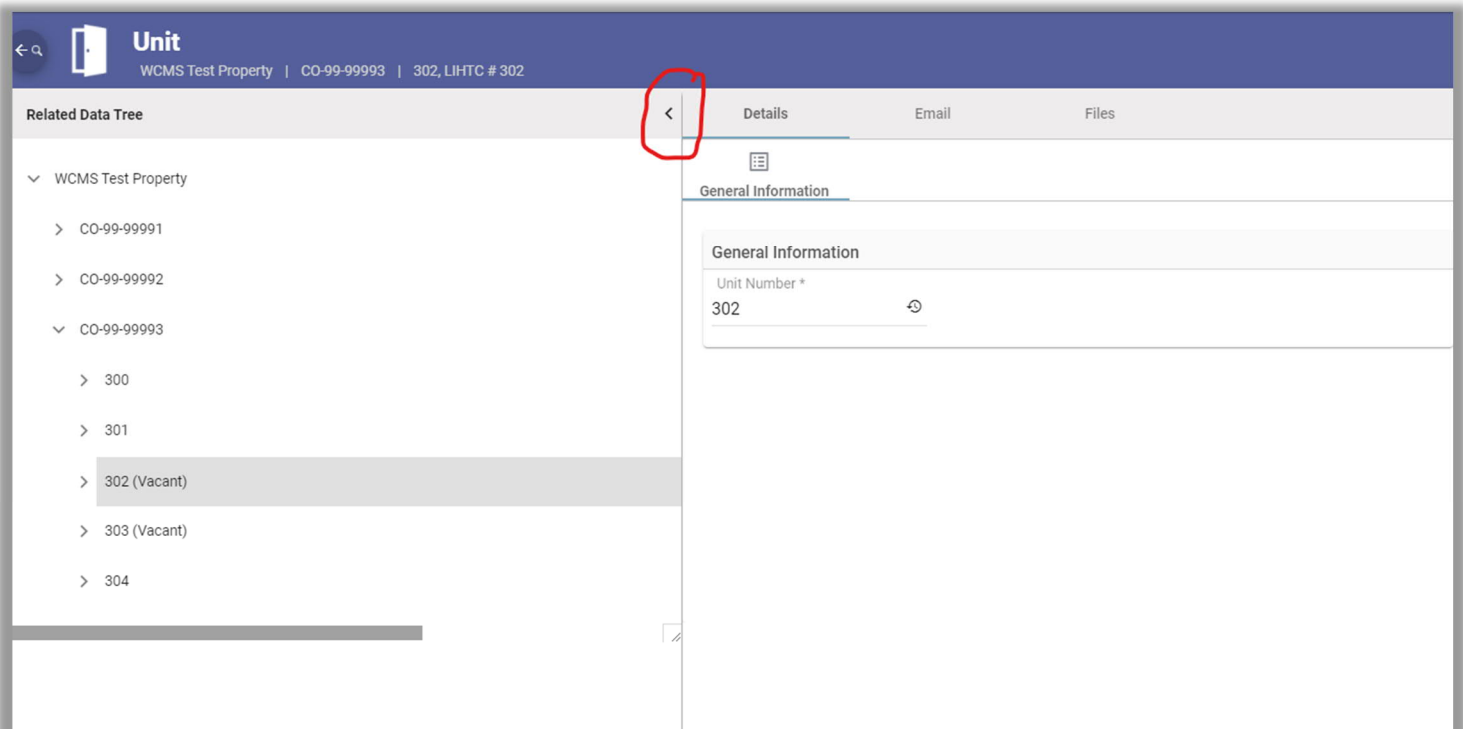
1. Navigate to the Unit screen using the left-navigation menu.
2. Do a search, entering a site and/or unit number.
3. From the Search results grid, click the three dots (...) under the Actions column, and select "Edit".
4. On the right-hand side of the screen, you will see Units and Certs (Figure 55).
  - Click on the Units option to see a list of other units in the same building
  - Click on the Certs option to see a list of all the certifications entered for that unit.

Figure 55



5. Additionally, from this same location you can view a "tree view" of the site's building, unit and tenant data to the left of the Unit window by clicking the "carrot" to the left of the "Details" tab (Figure 56).

Figure 56





## NextGen: ADDITIONAL TOOLS (continued)

Additional navigational tools (from the Tenant screen):

1. Navigate to the Tenant screen using the left-navigation menu.
2. Do a search, entering a site and/or unit number.
3. From the Search results grid, click the three dots (...) under the Actions column, and select "Edit".
4. On the right-hand side of the screen, you will see Units, Certs, and Priors (Figure 57).
  - Click on the Units option to see a list of other units in the same building
  - Click on the Certs option to see a list of all the certifications entered for that unit.
  - Click on the Priors option to see a list of any prior iterations of the recent certification (if the cert has been corrected).

Figure 57

The screenshot displays the 'Certification' interface for a tenant. The header shows 'Certification LIHTC - 11/19/2020 MI Bell Kristen' with sub-headers 'WCMS Test Property | CO-99-99993 | 301, LIHTC # 301'. On the right, there are buttons for 'Cert Actions', 'TIC Report', 'Delete', and 'Save'. Below the header, there are tabs for 'Details', 'Email', and 'Files'. Under 'Details', there are sub-tabs: 'Summary', 'Cert Information', 'Member Financials', and 'Other Programs'. The main content area is titled 'Household' and contains the following information:

Household Members	2	Household Type	Family
Move-In Date	11/19/2020	Social Services	
Number of Bedrooms	2	Single-Parent Household	No
Dependents Under 18	0	Disabled Household	No
Full-Time Students	0	Occupants 62 and Over	0

On the right side of the 'Household' section, there are three buttons: 'Units', 'Certs', and 'Priors'.

6. Additionally, from this same location you can view a "tree view" of the site's building, unit and tenant data to the left of the Tenant window by clicking the "carrot" to the left of the "Details" tab (Figure 58).

Figure 58

The screenshot shows the 'Certification' interface with a 'Related Data Tree' on the left. The tree is expanded to show the following structure:


- WCMS Test Property
  - CO-99-99991
    - 100 (Vacant)
      - Sheeran, E - 6/5/2021 - UT - LIHTC - Unit Transfer Out
      - Sheeran, E - 5/1/2021 - AR - LIHTC
      - Sheeran, E - 3/1/2021 - AR - LIHTC
      - Sheeran, E - 3/4/2020 - UT - LIHTC - Unit Transfer In
      - Boyd, P - 6/1/2018 - UT - LIHTC - Unit Transfer Out
      - Boyd, P - 5/21/2018 - MI - LIHTC
    - > 101
    - > 102
    - > 103
    - > 104
    - > CO-99-99992

The 'Details' tab is selected, and a red circle highlights the 'carrot' icon to the left of the 'Details' tab. The main content area shows the same household details as in Figure 57, but with additional information under 'Income, Rent and Designations':

Federal Set-Aside	60% AMI	Most Restrictive Income Designation	60% AMI	Most Restrictive Rent Designation	60% AMI
Income Averaging Designation					
Federal Income Limit	\$ 0.00		Federal Max Rent	\$ 0.00	\$ 958.00

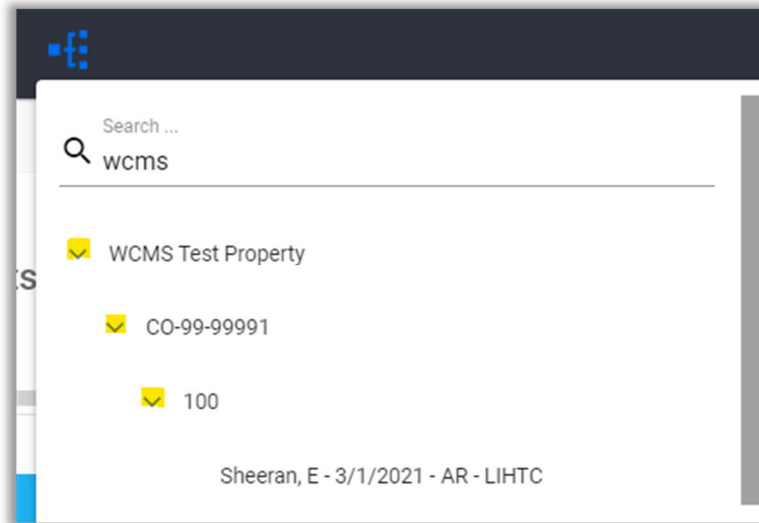
## NextGen: ADDITIONAL TOOLS (continued)

Creating a TIC report from a certification:

Navigate to any certification, from either the tree icon  (preferred), or the left-navigation menu.

- To select a Tenant certification from the tree icon, first click the “carrots” to the left of the Site name, building number, and unit number to expand the view. Then, click on the desired Tenant Certification to select it (Figure 59):

Figure 59

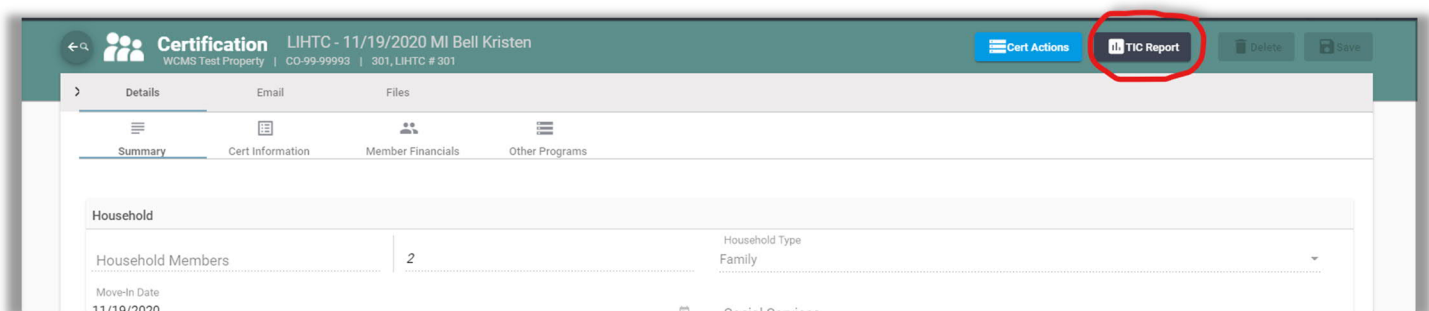


- If using the left-navigation menu, do a search, entering a site and/or unit number. Then, from the Search results grid, click the three dots (...) under the Actions column, and select “Edit”.

Click the TIC Report icon (Figure 60)



Figure 60



## NextGen: ADDITIONAL TOOLS (continued)

### Advanced Occupancy and Demographics Report Functions

Like the other grids throughout the NextGen system, the Occupancy and Demographics report in NextGen can be sorted, filtered, exported and more. (page 52, Figure 61)



- To sort by a specific column, click the column heading
- Columns can be dragged to other positions, as necessary. Additionally, you can open the Column Chooser by clicking the icon then dragging unneeded columns or dragging columns back into your grid. 
- Report data can be exported to Excel (recommended) to view the results more easily, by clicking the Export All Data icon. 
- Users can filter report results in several ways:
  - i. Clicking the upside-down triangle next to the column header, then selecting the appropriate option.
  - ii. Typing row below the column header, next to the looking glass icon. For date fields, there is also an option to select a specific date by clicking the down-arrow in the same field.
  - iii. Clicking "Create Filter" below the report results. This opens the "Filter Builder" window (page 52, Figure 62):
    1. Click the "+" to start a new filter, leaving "And" as the default if all the filter criteria must be met. Clicking the "+" allows you to add a new filter Condition (recommended) or Group.
    2. Click the "+" to start a new filter, but changing "And" to "Or", if only one element of the filter criteria must be met. Clicking the "+" allows you to add a new filter Condition (recommended) or Group.
    3. Clicking on each of the colored values:
      - a. Site: Clicking here will allow you to change the value to one of the other fields on the report, such as Cert Date.
      - b. Contains: Clicking here will allow you to change the criteria of how you wish to filter the data. For instance, if you selected "Cert Date" for the field, the value can be change to "Is Between".
      - c. <enter a value>: This is where you will enter the desired value for your filter. For the above example, you may type in '01/01/2021' to '12/31/2021' to filter your data to show all Cert Dates that fall between January 1 to December 31.

Figure 61

**Occupancy and Demographics Report**

Site Selection  
 WCMS Test Property All  Current Tenants  Include Archived  **Run**

Drag a column header here to group by that column 📄 📄 🔍 Search...

Site Name	Project Number	Building	Unit Number	Head of HH Last Name	Enter Date	Move In Date	Cert Date	Status	Cert Type	# S
WCMS Test Property	WCMS-Test	CO-99-99992	201	Ivan	05/25/2018	02/15/2017	02/15/2017	Submitted	MI	0
WCMS Test Property	WCMS-Test	CO-99-99993	304	Flanigan	04/12/2021	06/22/2020	06/22/2020	Submitted	MI	1
WCMS Test Property	WCMS-Test	CO-99-99993	302	Smith	05/04/2021	03/01/2020	04/05/2021	Submitted	MO	0
WCMS Test Property	WCMS-Test	CO-99-99992	200	Bunny	04/20/2018	10/04/2016	10/01/2017	Submitted	AR	0
WCMS Test Property	WCMS-Test	CO-99-99993	301	Sheeran	06/25/2021	05/06/2017	06/05/2021	Submitted	UT-I	0
WCMS Test Property	WCMS-Test	CO-99-99991	100	Sheeran	06/25/2021	05/06/2017	06/05/2021	Submitted	UT-O	0
WCMS Test Property	WCMS-Test	CO-99-99992	202	Sheeran	03/04/2020	05/06/2017	03/04/2020	Submitted	UT-O	0
WCMS Test Property	WCMS-Test	CO-99-99991	104	Goodall	05/25/2018	07/23/2017	07/23/2017	Submitted	MI	0

[Create Filter](#)

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**Close**

Figure 62

**Filter Builder** ✕

And +

✕ Site Name Contains <enter a value>

**OK** **CANCEL**