NextGen Frequently Asked Questions (FAQ's)

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Registering for NextGen

If I had a username for the old WCMS system, do I need to register for NextGen?

No. Since NextGen is just a new version of WCMS, existing users should sign into NextGen using their WCMS username and password.

If I never used the WCMS system for entering my tenant data, how do I register for NextGen?

Please visit the NextGen informational page at https://www.chfainfo.com/nextgen to get the link to the NextGen login page and instructions on how to register.

Can CHFA set up a NextGen account for me or my co-workers?

No. All users who need to access NextGen will need to register for his or her own account using the instructions at https://www.chfainfo.com/nextgen.

Can my co-workers and I share one NextGen user ID?

Maybe. NextGen does not allow for more than one account to be linked to the same email address. If you and your co-workers share one email address, then only one account can be created and the account will need to be shared. However, if each person at your property/company has his or her own company email, it is requested that each user register for an account. Please do not use personal email addresses to register for NextGen.

When registering for NextGen, which "User Type" do I select from the registration drop-down?

Please select "Compliance User" as the user type.

How does CHFA know which properties I need to access in NextGen?

It is required that all new registrants add the CHFA site name or site number to their registration request. Please note, the site name or number must be entered exactly as it appears in CHFA's system. For a list of Property Names and Property Numbers, please visit https://www.chfainfo.com/arh/asset/Documents/properties-with-property-number-pco.pdf and then add the corresponding info to your request before submitting it.

Registering for NextGen, continued

Can I sign into NextGen immediately after registering for the system?

> No. A CHFA representative will need to review then approve your request before you can sign in. Please be aware that approvals can take up to 24 hours. An email will be sent upon approval.

I recently registered for NextGen and my request was approved. However, when I tried to sign in again today, I get an error that my account is disabled. What should I do?

> This is a known glitch in NextGen and it has been submitted to the software company to fix. Please contact Peggy Boyd at pboyd@chfainfo.com and she can re-activate your account.

Logging in to NextGen

Where do I sign in to NextGen?

> Please visit the NextGen informational page at https://www.chfainfo.com/nextgen to get the link to the NextGen login page. The login page can then be saved as a bookmark in your web browser.

Which internet browser should I use when logging in to NextGen?

> NextGen is compatible with Google Chrome and Microsoft Edge. Unfortunately, the system is not compatible with Internet Explorer.

If I have forgotten my username or password, what should I do?

> On the NextGen login page, there is a link to click if you're having "Trouble signing in". Clicking this link gives you the option to recover your username and/or your password. *Please note: the exact format of email address that you entered upon registering for WCMS or NextGen must be entered for the system to recover your username or password. For example, when you registered for an account and you entered your email using upper- and lower-case lettering, that same format must be used when trying to recover your username and/or password in NextGen.

Since I must enter the exact email address I used to register for WCMS/NextGen to recover my user name or password, what should I do if I no longer have access to that email address?

> Please email Peggy Boyd at pboyd@chfainfo.com to set a temporary password to use to log in.

NextGen Access and Permissions

When I click the site name or Building ID number (BIN) from the blue "tree" icon at the top of the NextGen screen, I receive an error stating that I am not authorized to access that site or property. What should I do?

> External users do not have access to view the site or building information in NextGen and instead need to navigate directly to the unit or tenant certification you need to view. To do this from the blue "tree", click the arrows to the left of site, building or unit numbers to expand the tree. Otherwise, please click "Property Group" from the left-hand menu, then click either the "Unit" or "Tenant" menus on the left of the screen to perform a search.

When I click my property name from the middle of the home screen, the system does not take me to my property. Why is this?

> The NextGen system does not allow external users to view property or building data. The site name drop-down in the center of the home page is only to select a site to view its vacancy data in the below chart. Clicking the property name does not take you to the property. Instead you need to navigate to the Unit or Tenant screen using the blue tree icon at the top or by clicking "Property Group" on the left-hand menu and selecting either "Units" or "Tenants".

If my property portfolio has changed and I need sites added or removed from my NextGen account, what should I do?

> Please email Peggy Boyd at pboyd@chfainfo.com with the names of the properties you need added or removed, and she will update your account.

If someone with my property or organization no longer works there, what should I do?

> Please email Peggy Boyd at pboyd@chfainfo.com with the name of the person or persons who have left your organization and she can deactivate the account(s).

If we have a new employee who needs to access NextGen, what should I do?

> All users who need to access NextGen will need to register for his or her own account using the instructions at https://www.chfainfo.com/nextgen.

If I need access to the XML Tenant Upload feature for my properties, what should I do?

> All users who need to access to the XML Tenant Upload feature in NextGen should email Peggy Boyd at pboyd@chfainfo.com, making sure to include your user name. Once your request is received, you will be assigned the special permissions for that feature.

Navigation of NextGen

When I first log in to NextGen and click the "M" for Multifamily, nothing happens and the screen looks distorted. What do I need to do?

> If the screen looks distorted and you are unable to view anything beyond the landing page, you are most likely using Internet Explorer as your browser. NextGen is not compatible with Internet Explorer and you will need to sign out and then log in to the system using Google Chrome or Microsoft Edge.

When I click the site name or Building ID number (BIN) from the blue "tree" icon at the top of the NextGen screen, I receive an error stating that I am not authorized to access that site or property. What should I do?

> External users do not have access to view the site or building information in NextGen and instead need to navigate directly to the unit or tenant certification you need to view. To do this from the blue "tree", click the arrows to the left of site, building or unit numbers to expand the tree. Otherwise, please click "Property Group" from the left-hand menu, then click either the "Unit" or "Tenant" menus on the left of the screen to perform a search.

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Where do I go if I need to update my email address, phone number or password?

> Please click on your username in the top right of the screen, then select "Profile". Once you have updated your profile information or password, but sure to click "Save" at the top.

When I navigate to the Tenant screen, I am unable to access the XML Tenant Upload tab. What do I need to do?

> All users who need to access to the XML Tenant Upload feature in NextGen should email Peggy Boyd at pboyd@chfainfo.com, making sure to include your user name.

Miscellaneous "Oddities"

I prefer to view my property's data in a tree view. Other than the blue tree icon at the top of NextGen, where else can I see this type of view?

Whenever you navigate to one of your site's units or tenant certifications, you then have the option to view a property "tree" from those screens.

From the Unit screen:

1. Click on "Property Group" from the left-hand menu, then select "Unit".
2. Do a search for your property.
3. Under the "Actions" column, select "Edit" for any unit.
4. To the left of the "Details", "Email", and "Files" tabs in the grey bar above the unit's General Information, you will see a right-pointing arrow. Click the arrow, and the "Related Data Tree" will appear to the left of the unit general info area.
5. REMEMBER: External users do not have access in NextGen to view the property details or building details, so only click on the units or the arrow to the left of the unit number to see the tenant certifications for that unit.

From the Tenant screen:

1. Click on "Property Group" from the left-hand menu, then select "Tenant".
2. Do a search for your property.
3. Under the "Actions" column, select "Edit" for any tenant certification.
4. To the left of the "Details", "Email", and "Files" tabs in the grey bar above the tenant certification you will see a right-pointing arrow. Click the arrow, and the "Related Data Tree" will appear to the left of the unit general info area.
5. REMEMBER: External users do not have access in NextGen to view the property details or building details, so only click on the units or the arrow to the left of the unit number to see the tenant certifications for that unit.

When I view my profile, why does the hidden password look much longer than my actual password?

The software company just filled the "Password" field with dots, to reflect that the password is hidden. The number of dots is not indicative of the length of the actual password.

How do I change my password?

In the "Profile" screen, click the "Password" field and highlight and delete all the dots that are shown there. Type in your new password, making sure that it is at least 8 characters in length. Then, tab to the "Confirm Password" field and retype the same password that you just created. Be sure to save your changes before exiting the profile screen.

Miscellaneous "Oddities", continued

When I enter a new recertification for an existing household and edit data on the "Member Financials" screen, I noticed that the date of birth for the household member is changing to the day before the actual birthdate. Why?

This is a known glitch that was discovered by another user. The software company is working to fix this problem. In the meantime, be sure to watch the date of birth when making changes and update the "Birth Date" field back to the correct date, then click "Save". Ensure that the date of birth is correct before clicking "Cert Actions" to modify/submit the certification.

When I view the Occupancy and Demographics Report results in NextGen, the Move-in Date and the Cert Date are correct. However, when I export the report to Excel, those dates all show the day before the correct date. What is wrong?

This is a known glitch that was discovered by another user. The software company is working to fix this problem and a fix should be released in November 2021. In the meantime, please contact Peggy Boyd at pboyd@chfainfo.com or your CHFA Program Compliance Officer if you need a copy of the Occupancy and Demographics in Excel format emailed to you.