

HDS NextGen

New User	2
Logging in.....	3
Logging Out.....	4
General Navigation	5
Basic	5
Left-hand Side Menu	5
Home Icon.....	6
Favorites Icon	6
Tree Icon.....	7
Unit.....	8
Edit Unit	12
Tenant	13
CERTIFICATIONS.....	16
Reviewing Existing Certificates.....	16
Reading the Certification Screen	18
XML Upload.....	19
Manual.....	21
Recertification	21
Summary	23
Cert Information	24
Member Financials	24
Other Programs	25
Move Out	27
Unit Transfer - In	28
Unit Transfer - Out	29
Reports.....	30
Occupancy & Demographics Report.....	30
TIC Report.....	35
Glossary	37

New User

- 1 Click <https://vt.hdsoftware.net/WebCompliance/Login/Login?ReturnUrl=%2fWebCompliance>
- 2 Click Register

VHFA - Web Compliance Management System

Login

HDS Login

Login

User Name

Password

Login

[Forgot Password](#) [Register](#)

- 3 Enter all fields with an asterisk. You do not need to enter anything in the Properties section in order to register.

VHFA - Web Compliance Management System

Register

HDS Register

All fields are required *

Profile

First Name *

Last Name *

Email *

Username *

Password * Minimum Length is 4 characters.

Confirm Password*

Organization

Name *

Role *

Address *

City *

State *

ZipCode *

Phone *

Properties

Enter a property number and hit add to add it to the list of properties.

Number

You have requested access to the following properties

Number	Name
--------	------

Copyright © 1998-2019 Housing and Development Software. All rights reserved. Version: 16.0.0.0

- 4 Click Submit Registration
- 5 Email Kim Roy at kroy@vhfa.org, advising that you registered as a new user. She will grant you permissions as a user.

[Back to Table of Contents](#)

Logging in

¹ Open HDS portal <https://vt-portal.hdsoftware.net/auth/login>

² Log-in using username and password previously used to access Web Compliance

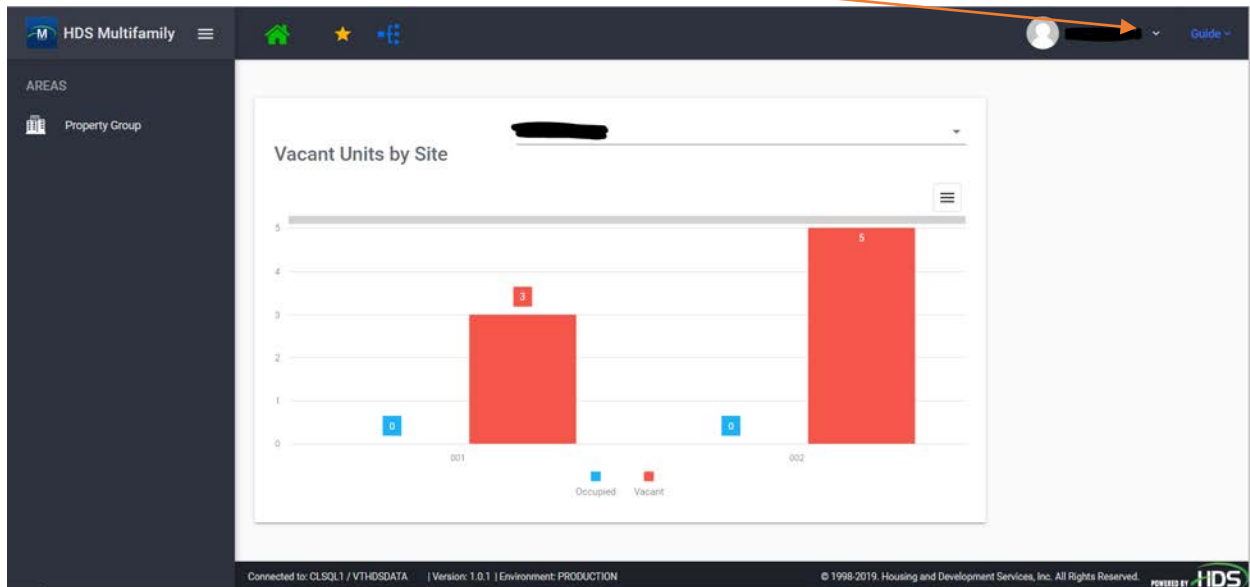
Helpful Hint: The *Remember Me* checkbox provides the option to log in without having to type in your username and password each time.

³ If this is your first time logging in, check the box next to I agree to EULA terms and conditions, then you will be allowed to click Sign In

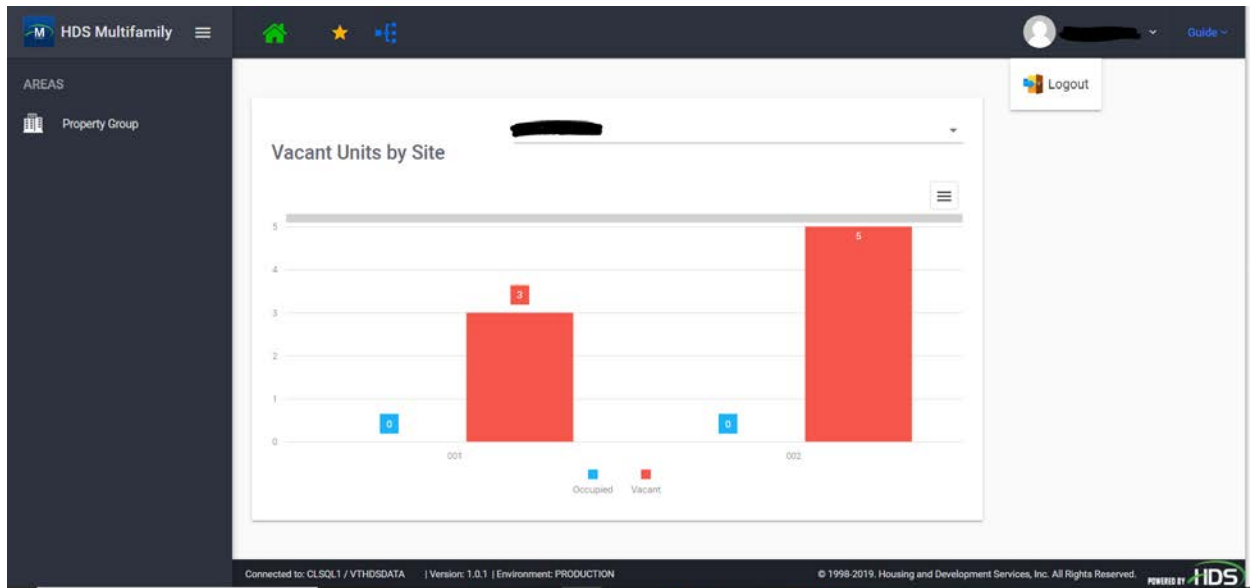
The screenshot shows the login interface for the HDS portal. At the top is the Multifamily logo, which consists of a blue square with a white 'M' and the word 'MULTIFAMILY' below it. Below the logo are two input fields: 'Username *' and 'Password *'. The 'Username *' field contains a blurred blacked-out text. Below the password field is a 'Remember Me' checkbox. At the bottom of the form is a 'SIGN IN' button. Below the 'SIGN IN' button is another checkbox labeled 'I agree to EULA terms and conditions' with a 'View EULA' button next to it. A blue arrow points from the 'Remember Me' checkbox to the 'SIGN IN' button, and an orange arrow points from the 'I agree to EULA terms and conditions' checkbox to the 'SIGN IN' button.

Logging Out

¹ Click drop-down arrow next to your user name



² Click Logout



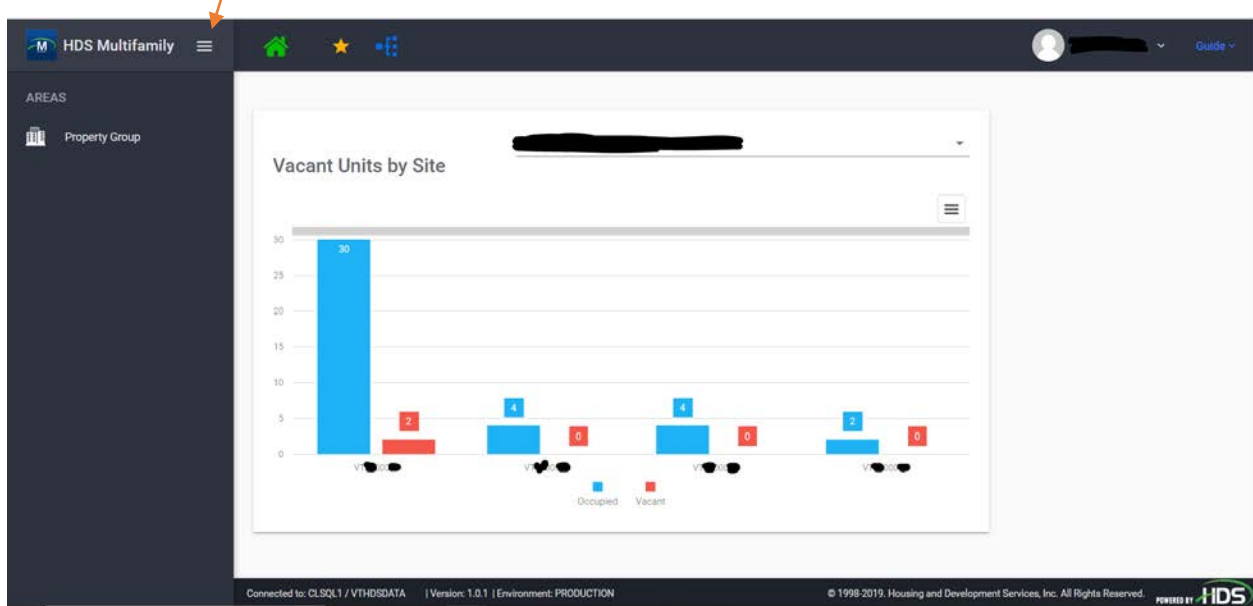
[Back to Table of Contents](#)

General Navigation

Helpful Hint: If the system is idle for an hour, the application will timeout and you will be required to log in again.

Basic

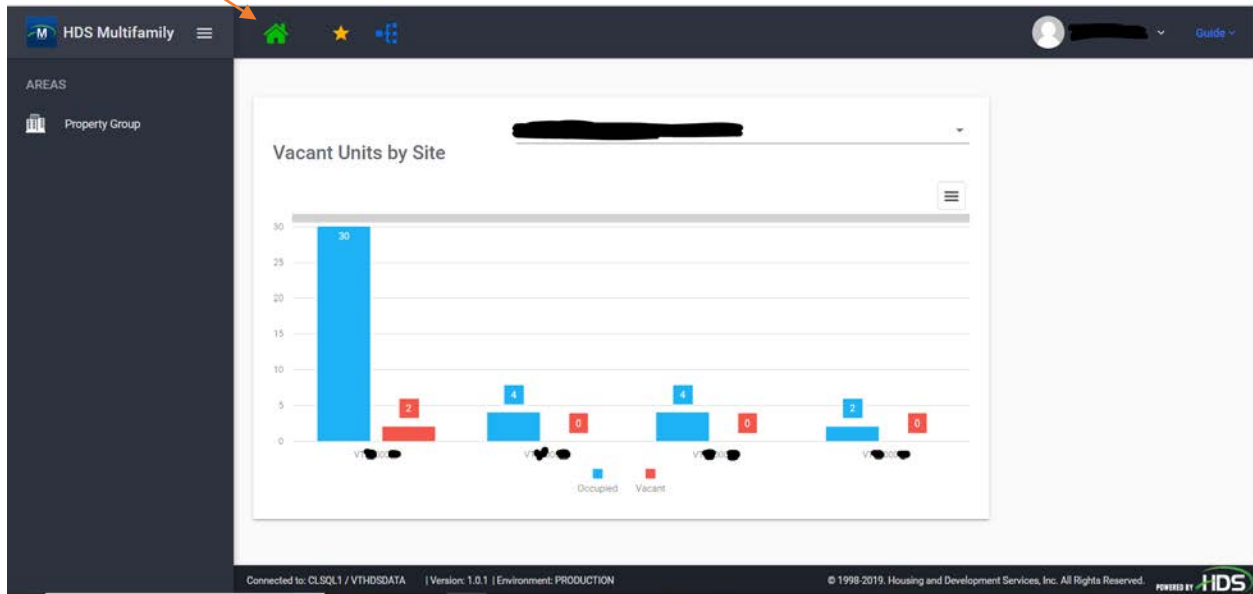
Left-hand Side Menu



You may click on the bars next to the HDS Multifamily icon to hide the left toolbar. To re-pin, move the cursor over to the left side of the screen until the toolbar re-appears and click on the bars again.

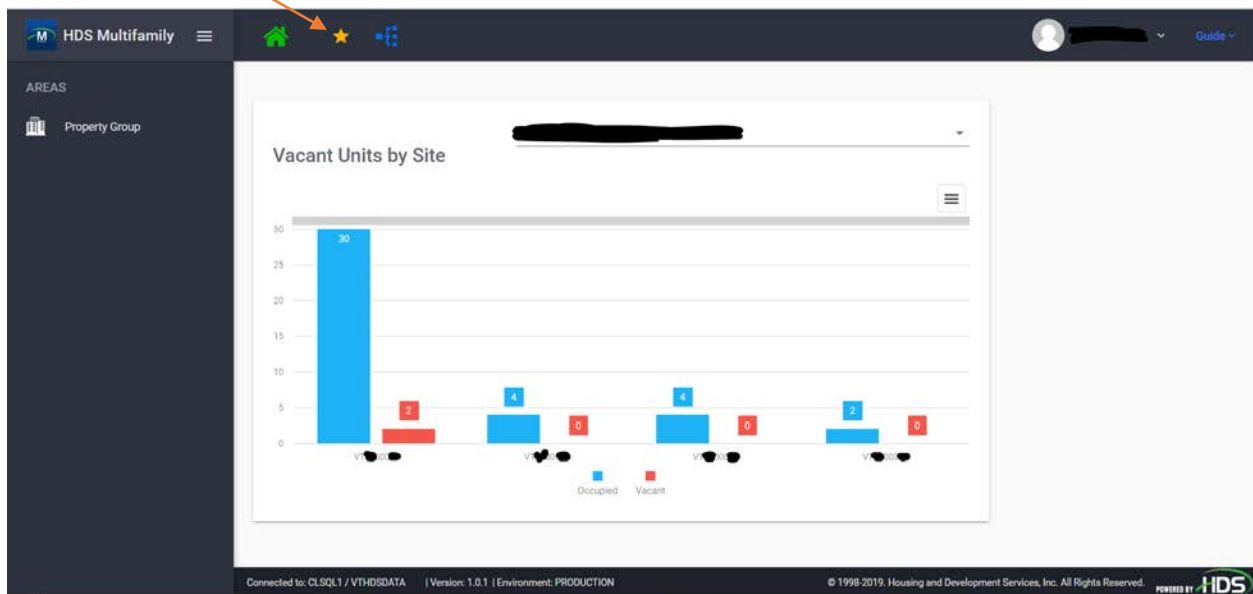
Helpful Hint: This left toolbar does not aid in changing screens once you have searched a site. If you use this, you will go back to a search screen.

Home Icon



This will bring you back to the main screen regardless of where you are in the system.

Favorites Icon



This icon allows you to add favorites to the top utility toolbar, allowing faster navigation to different areas of the system.

To add a bookmark:

¹ Hover over star icon

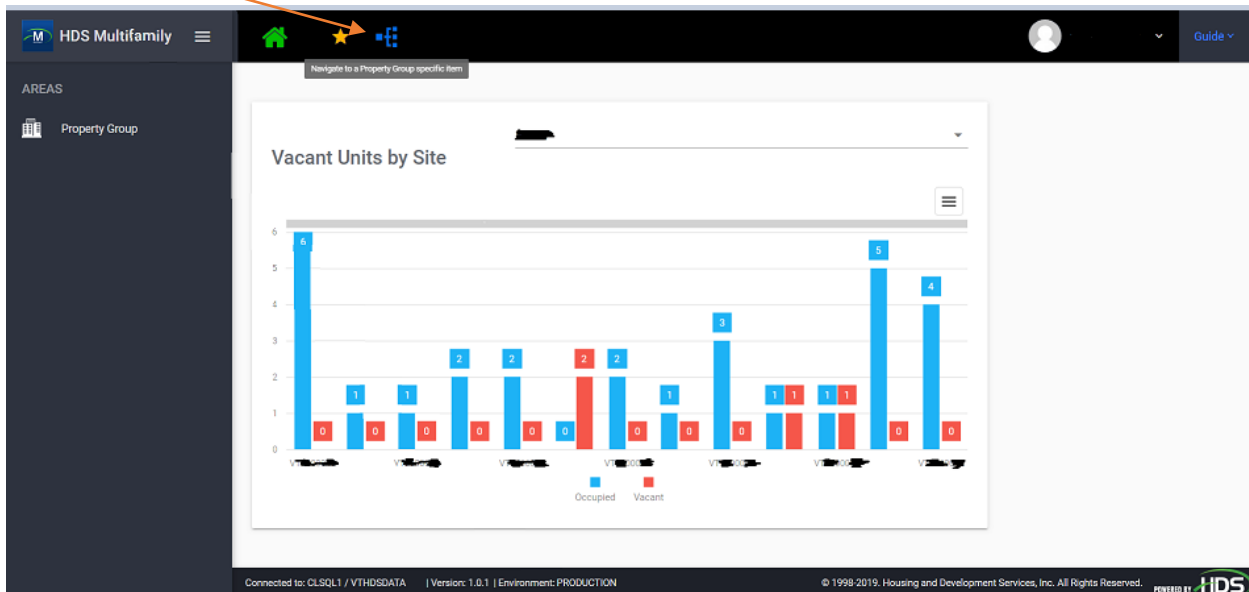
[Back to Table of Contents](#)

2 Click on area you want to bookmark. A star icon will appear and the icon for that area will appear on your toolbar



3 To remove bookmarks simply follow the same directions. When you click a starred area, the star will disappear, and the icon will be removed from your toolbar.

Tree Icon

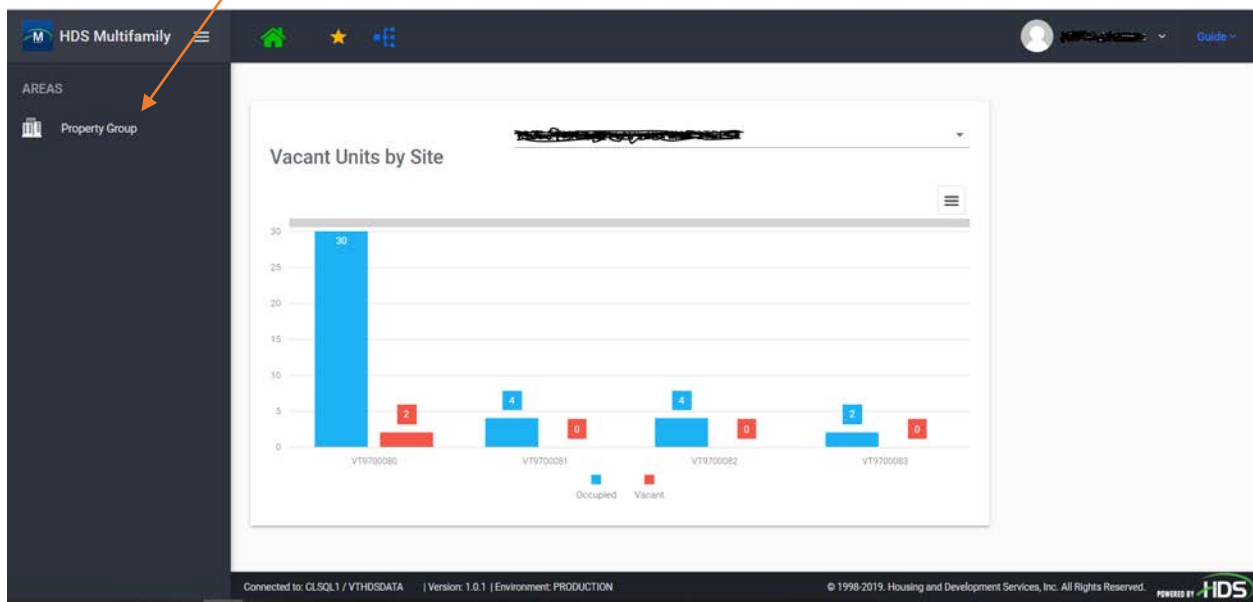


Click on this icon to navigate between different Sites without going back to a Search screen

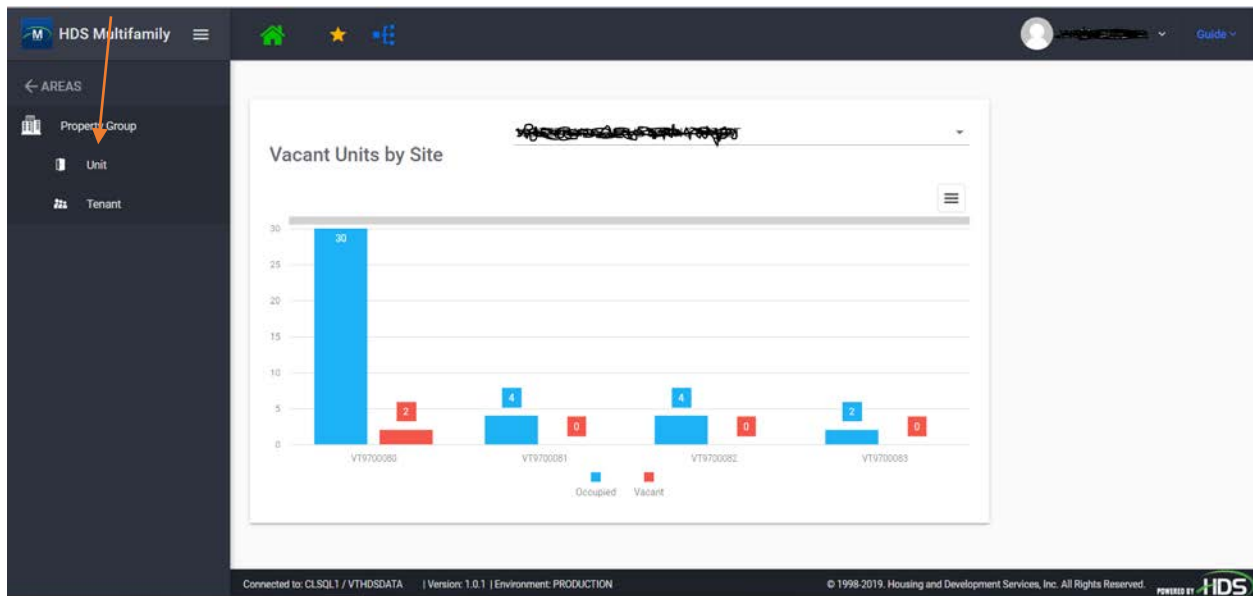
[Back to Table of Contents](#)

Unit

1 Click Property Group on left toolbar

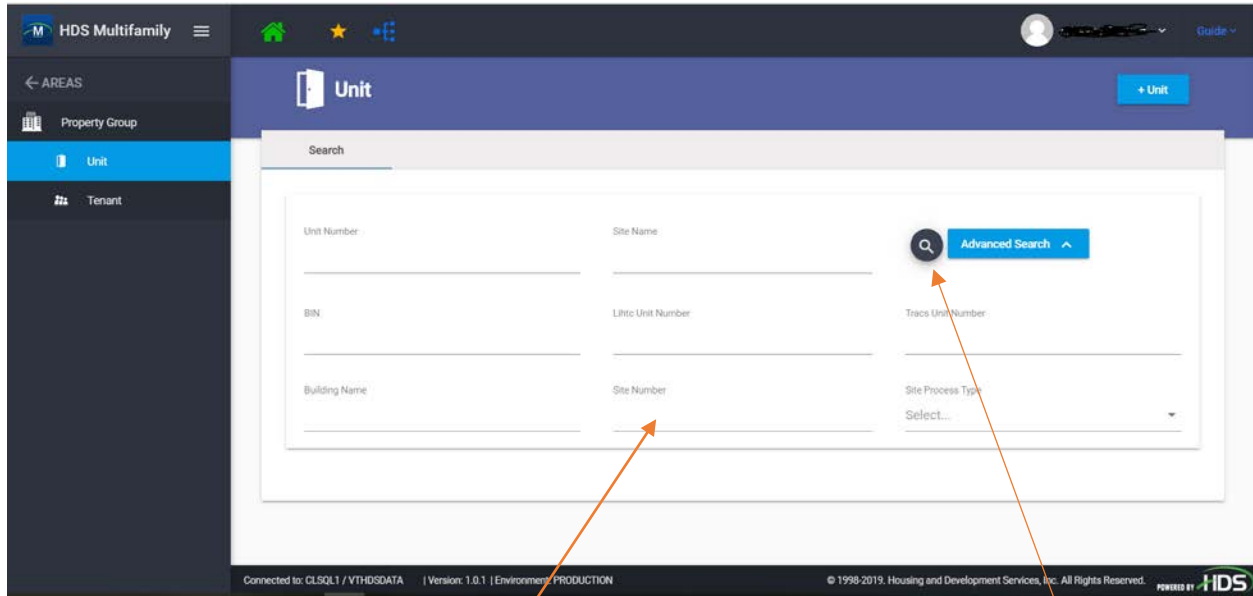


2 Click Unit



3 Click Advanced Search

[Back to Table of Contents](#)

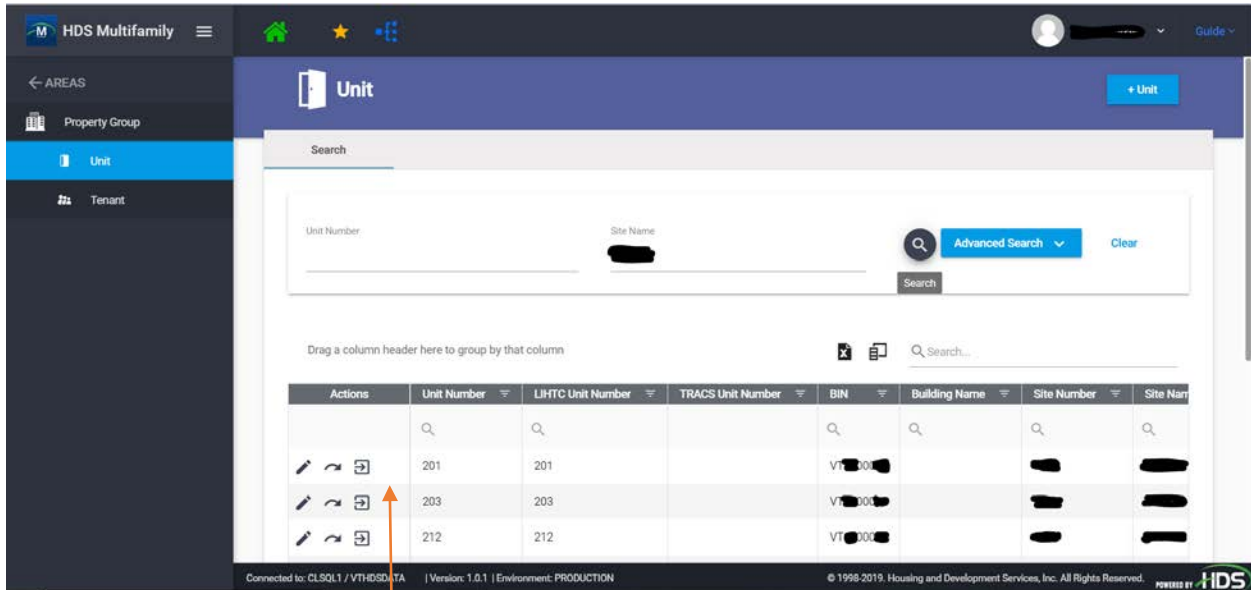


4 Enter Property number in the Site Number field

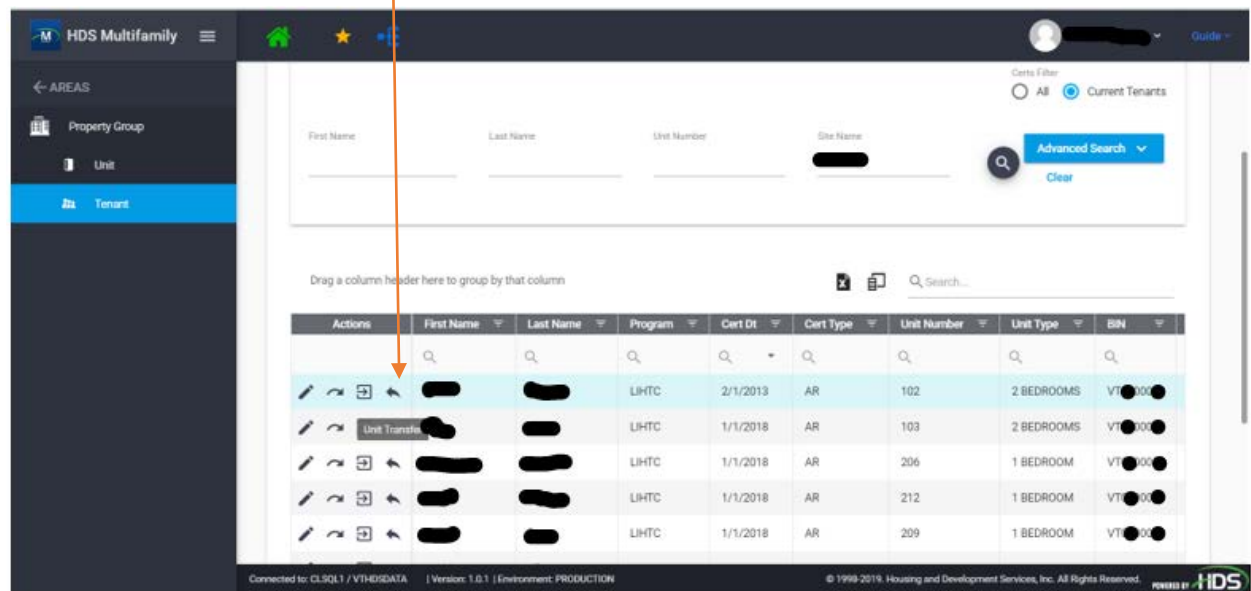
5 Press enter on the keyboard or click the magnifying glass next to Advanced Search

[Back to Table of Contents](#)

6 You will see several Actions available:



Helpful Hint: You may see different actions available, depending on whether your site has vacant units. Note: Unit transfer is available on the site shown below, but not the site shown above.



[Back to Table of Contents](#)

⁷ Proceed to separate detailed procedures for each Action type –

Edit

Recertify

Move Out

Unit Transfer – In

Unit Transfer – Out

Edit Unit

1 Click pencil next to unit

2 Amend data as necessary

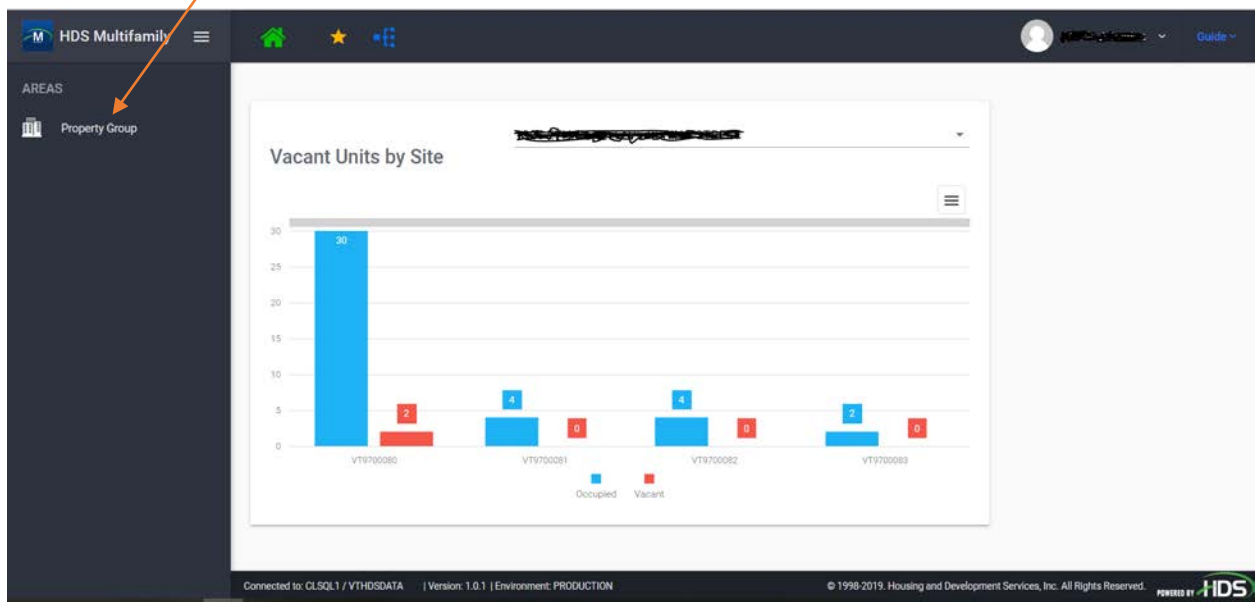
The screenshot displays the 'Unit' edit interface in the HDS Multifamily system. The page title is 'Unit' and the breadcrumb trail shows 'Property Group'. The main content area is titled 'DETAILS' and contains a 'General Information' section with a 'Unit Number' field set to '102'. To the right, the 'Unit Characteristics' section shows 'Unit Type' as '2 BEDROOMS' and 'Square Footage' as '789'. A 'Save' button is located in the top right corner of the form area. The footer includes technical details like 'Connected to: CLSQL1 / VTHDSDATA', 'Version: 1.0.1 | Environment: PRODUCTION', and '© 1998-2019. Housing and Development Services, Inc. All Rights Reserved.' along with the 'POWERED BY HDS' logo.

3 Click Save

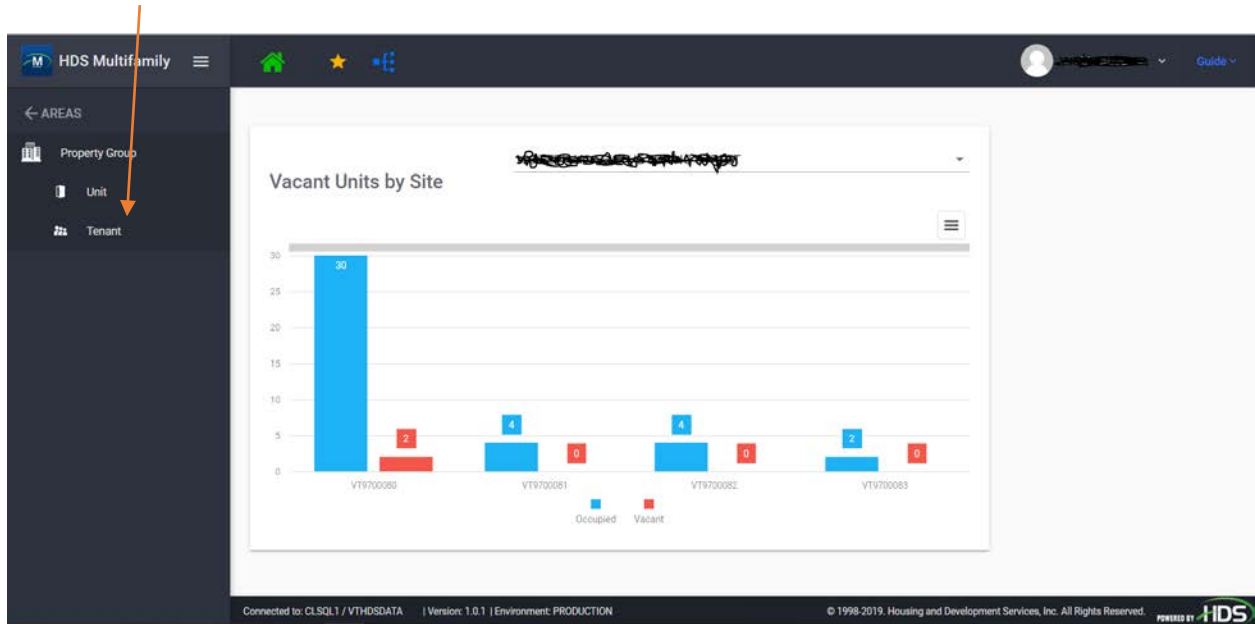
[Back to Table of Contents](#)

Tenant

1 Click Property Group on left toolbar

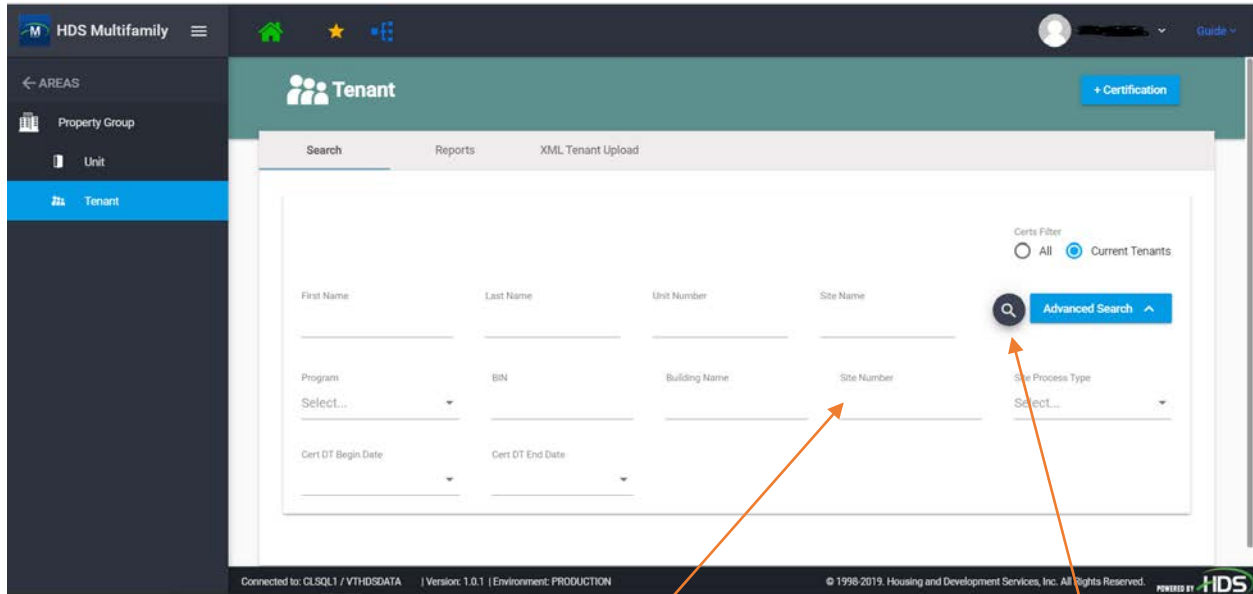


2 Click Tenant



[Back to Table of Contents](#)

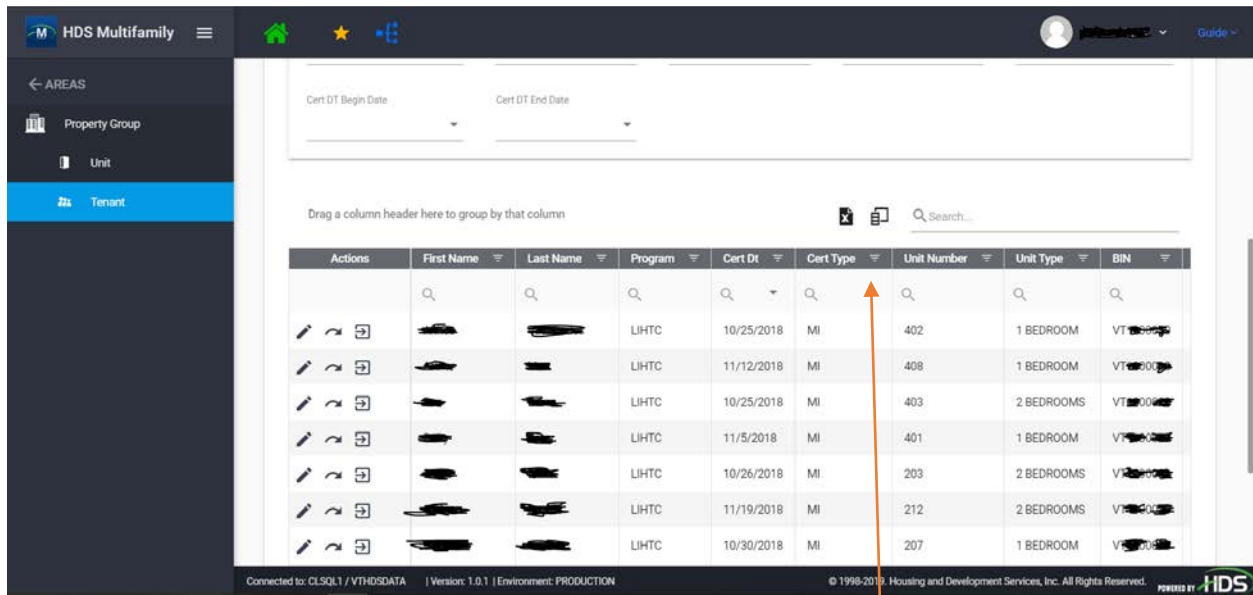
3 Click Advanced Search



4 Enter Property number in the Site Number field

5 Press enter on the keyboard or click the magnifying glass next to Advanced Search

6 You should see several Actions available



EDIT



RECERTIFY

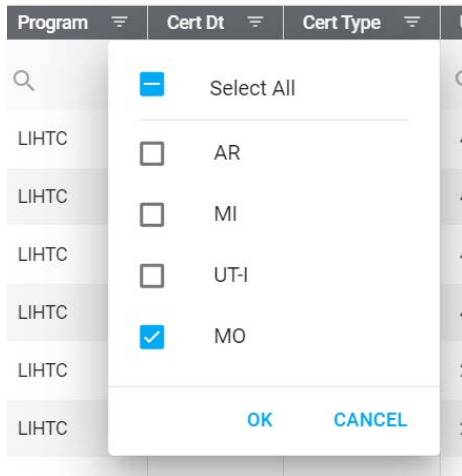


MOVE OUT

Helpful Hint: Narrow down results by any of the column headers by clicking the down arrow.

For example, you can choose to only see Move Outs by selecting MO from the Cert Type filter

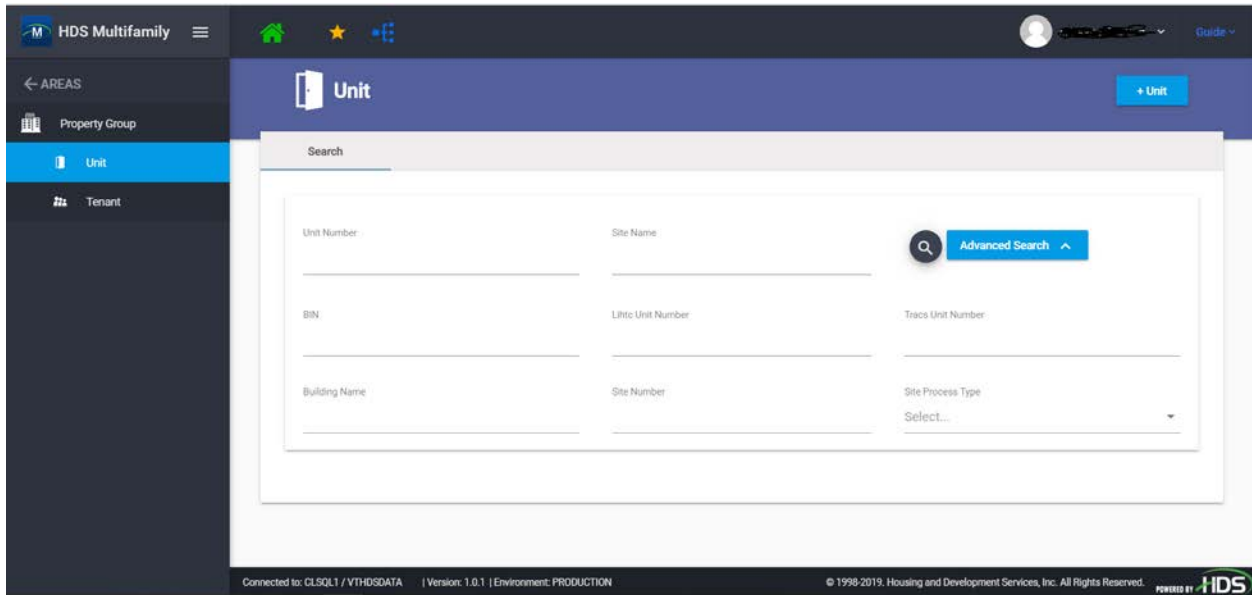
[Back to Table of Contents](#)



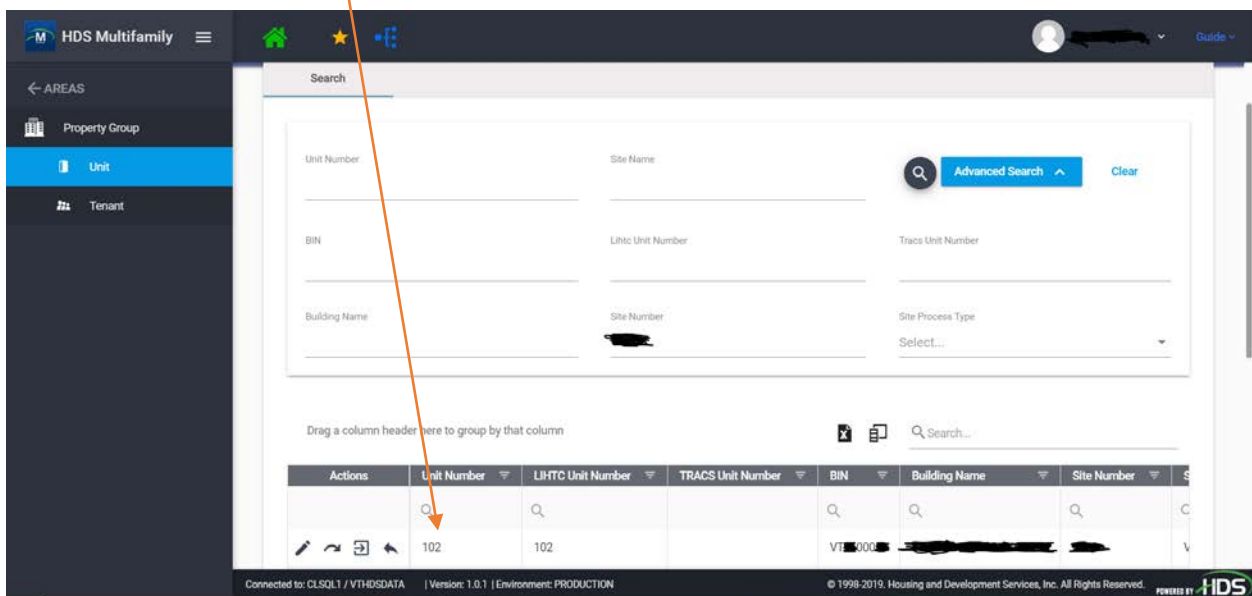
CERTIFICATIONS

Reviewing Existing Certificates

- 1 Log in to HDS NextGen
- 2 Click Property Group on left toolbar
- 3 Click Unit
- 4 Click Advanced Search

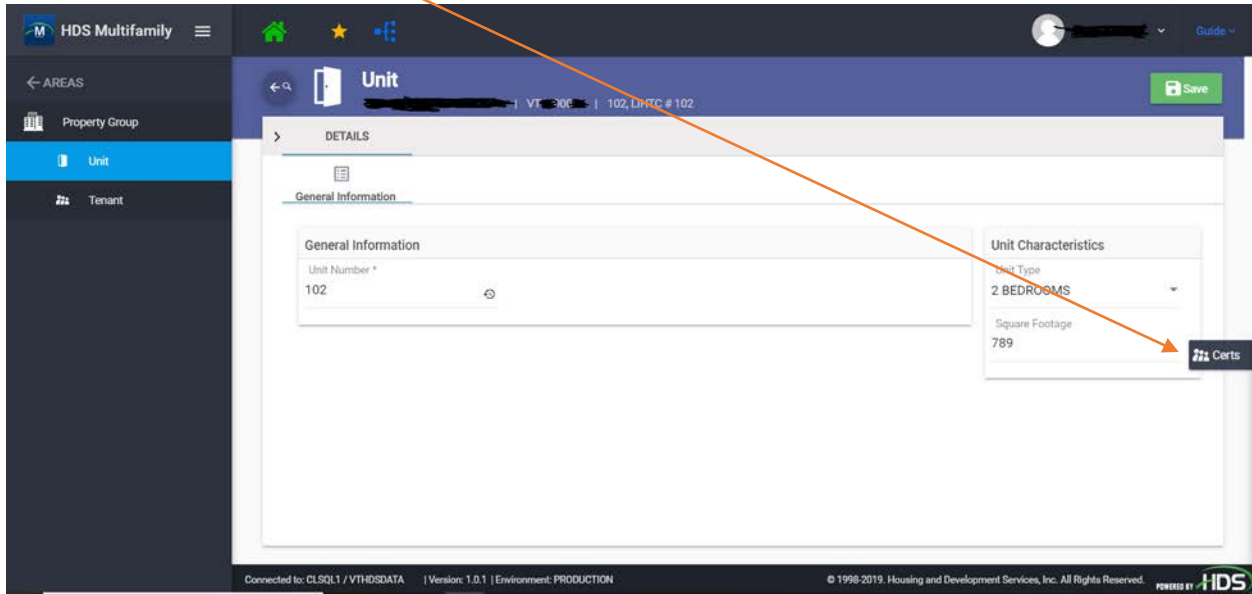


- 5 Enter Property number in the Site Number field
- 6 Press enter on the keyboard or click the magnifying glass next to Advanced Search
- 7 Click the unit number

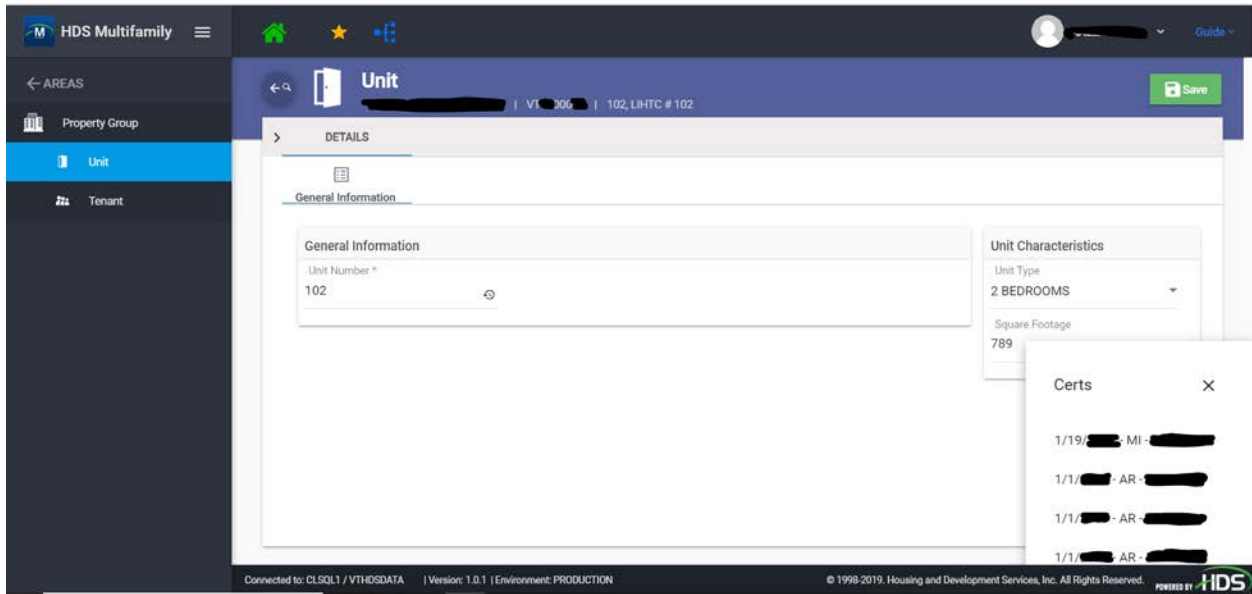


[Back to Table of Contents](#)

8 Click Certs on right side.



Helpful Hint: Oldest will appear on the top; scroll to bottom to see newest certs.



[Back to Table of Contents](#)

Reading the Certification Screen

Breadcrumbs appear on the top of the screen to help remind you of your location within the system.

Date and cert type you are working on

Site name

Building number

Tenant name

Unit number

The screenshot shows the 'Certification' screen in the HDS Multifamily system. The breadcrumb trail at the top reads: 'Certification' > 'LIHTC - 5/13/2019 AR' > 'VT # 100' > 'HTC # 1'. Annotations with arrows point to these elements: 'Site name' points to 'LIHTC - 5/13/2019 AR', 'Building number' points to 'VT # 100', 'Date and cert type you are working on' points to 'HTC # 1', 'Tenant name' points to 'Certification', and 'Unit number' points to 'LIHTC - 5/13/2019 AR'. The main content area is divided into 'Programs' and 'Household' sections. The 'Programs' section contains a table with columns for Program, HUD Type, and Income Status. The 'Household' section contains fields for Household Members, Move-In Date, Household Type, and Social Services.

Program	HUD Type	Income Status
HOME	HOME	<= 50% AMGI
TAX CREDIT	Other	50

Household Members	Household Type
1	GENERAL OCCUPANCY

Move-In Date: 5/17/2011

Social Services: Single-Parent Household

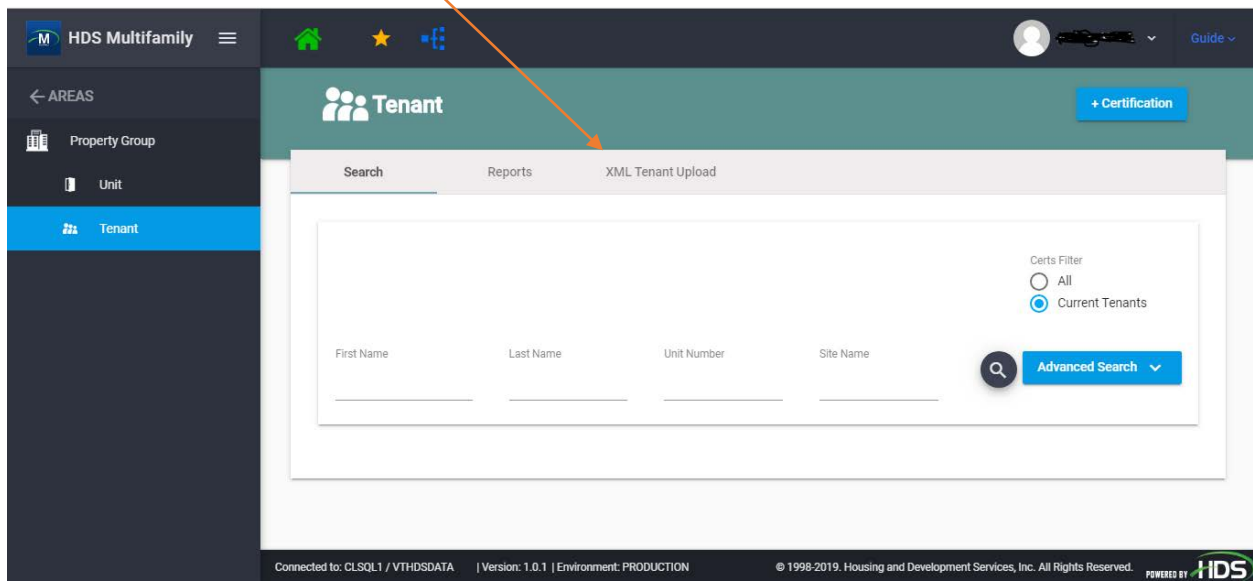
Footer: Connected to: CLSQL1 / VTHDSDATA | Version: 1.0.1 | Environment: PRODUCTION | © 1998-2019, Housing and Development Services, Inc. All Rights Reserved. POWERED BY HDS

[Back to Table of Contents](#)

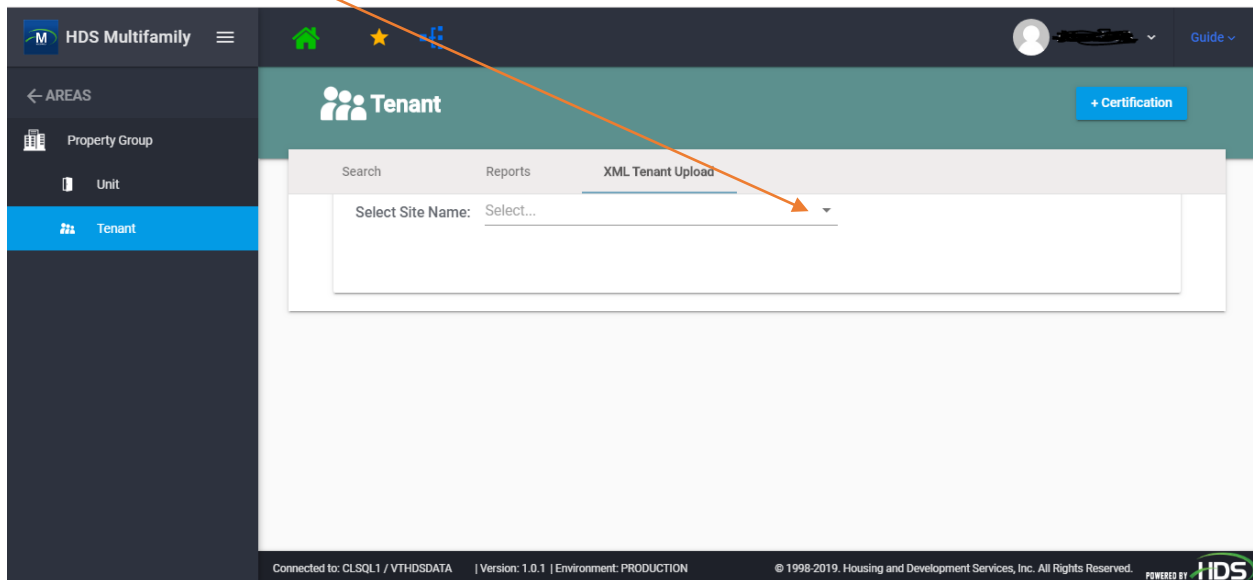
XML Upload

Helpful Hint: Use XML Version 5.0 for best results.

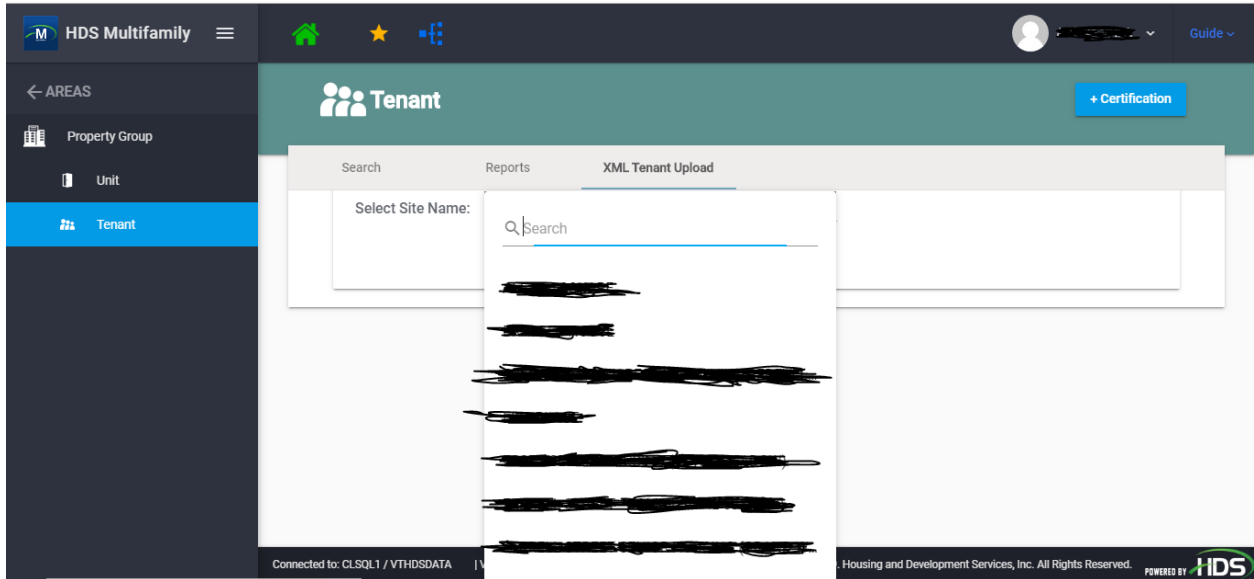
- 1 Log in to HDS NextGen
- 2 Click Property Group on left toolbar
- 3 Click Tenant
- 4 Click XML Tenant Upload



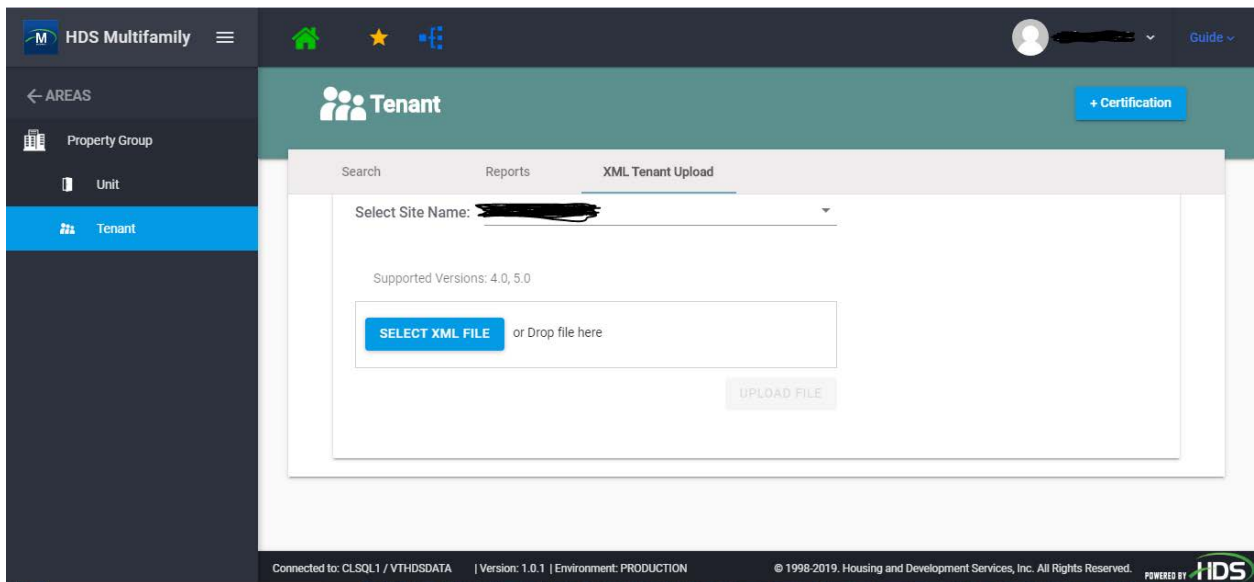
- 5 Click drop-down arrow next to Select Site Name – choose appropriate site from list or type in Search box



[Back to Table of Contents](#)



6 Select the XML file from the location you've stored it on your computer OR drag and drop the file into the box.



7 Click Upload File

[Back to Table of Contents](#)

Manual

Recertification

- 1 Log in to HDS NextGen
- 2 Click Property Group on left toolbar
- 3 Click Tenant
- 4 Click Advanced Search

The screenshot displays the 'Tenant' search interface in the HDS Multifamily system. The left sidebar shows navigation options: AREAS, Property Group, Unit, and Tenant. The main content area has tabs for Search, Reports, and XML Tenant Upload. The search form includes the following fields and controls:

- Certs Filter:** Radio buttons for 'All' and 'Current Tenants' (selected).
- Search Fields:** First Name, Last Name, Unit Number, Site Name, Program (dropdown), BIN, Building Name, Site Number, Cert DT Begin Date, and Cert DT End Date.
- Advanced Search:** A blue button with a magnifying glass icon and the text 'Advanced Search'.

Two orange arrows are overlaid on the image: one points to the 'Site Number' input field, and the other points to the magnifying glass icon next to the 'Advanced Search' button.

- 5 Enter Property number in the Site Number field
- 6 Press enter on the keyboard or click the magnifying glass next to Advanced Search

7 You should see several Actions available

Actions	First Name	Last Name	Program	Cert Dt	Cert Type	Unit Number	Unit Type	BIN
	[REDACTED]	[REDACTED]	LIHTC	10/25/2018	MI	402	1 BEDROOM	VT [REDACTED]
	[REDACTED]	[REDACTED]	LIHTC	11/12/2018	MI	408	1 BEDROOM	VT [REDACTED]
	[REDACTED]	[REDACTED]	LIHTC	10/25/2018	MI	403	2 BEDROOMS	VT [REDACTED]
	[REDACTED]	[REDACTED]	LIHTC	11/5/2018	MI	401	1 BEDROOM	VT [REDACTED]
	[REDACTED]	[REDACTED]	LIHTC	10/26/2018	MI	203	2 BEDROOMS	VT [REDACTED]
	[REDACTED]	[REDACTED]	LIHTC	11/19/2018	MI	212	2 BEDROOMS	VT [REDACTED]
	[REDACTED]	[REDACTED]	LIHTC	10/30/2018	MI	207	1 BEDROOM	VT [REDACTED]

EDIT RECERTIFY MOVE OUT UNIT TRANSFER

8 Click the RECERTIFY arrow

9 Click drop-down arrow next to Certification Type *

Recertify

- Recertification
- Initial
- Interim

10 Select Recertification

11 Enter Effective date of recertification

12 Click Create Recertification

[Back to Table of Contents](#)

Recertify

Certification Type *
Recertification

Effective Date *
5/13/2019

[Create Recertification](#) [Cancel](#)

13 Click on Cert Information

The screenshot shows the 'Certification' details page for LIHTC - 5/13/2019 AR. The 'Cert Information' tab is selected, and an orange arrow points to it. The page displays details for Programs, Household, and Social Services.

Programs		
Program	HUD Type	Income Status
HOME	HOME	<= 50% AMGI
Program	HUD Type	Income Status
TAX CREDIT	Other	50

Household	
Household Members	7
Household Type	GENERAL OCCUPANCY
Move-in Date	5/17/2011
Social Services	Single Parent Household

Summary screen:

The screenshot shows the 'Certification' summary page for LIHTC - 5/13/2019 AR. The 'Summary' tab is selected. The page displays an overview of the certification details, including Programs, Household, and Social Services.

Programs		
Program	HUD Type	Income Status
HOME	HOME	<= 50% AMGI
Program	HUD Type	Income Status
TAX CREDIT	Other	50

Household	
Household Members	7
Household Type	GENERAL OCCUPANCY
Move-in Date	5/17/2011
Social Services	Single Parent Household

This screen gives an overview of the Property info. There is nothing to update on this screen – data will pull from subsequent screens.

[Back to Table of Contents](#)

Cert Information screen:

The screenshot shows the 'Certification' screen for LIHTC - 5/13/2019 AR. The 'Cert Information' tab is active, displaying the following details:

Field	Value
Certification Type	Recertification
Effective Date	5/13/2019
Self Certification	No
Correction	No
Original Effective Date	

Recent Income Certification Details		
Effective Date of Most Recent Income C...		
Household Income at Most Recent Income...		
Household Size at ...		

Qualification Details		
LIHTC Qualifica...	5/17/2011	
Household Income...		
Household Size at ...		

Income, Rent and Designations		
Federal Set-Aside	Most Restrictive Income *	Most Restrictive Rent *
60% AMI	50% AMI	50% AMI

1 Click anywhere with a field header to enter data.

2 Scroll Down to complete entire screen

3 Scroll to top of screen; click green Save button

Member Financials screen:

The screenshot shows the 'Certification' screen for LIHTC - 5/13/2019 AR. The 'Member Financials' tab is active, displaying the following details:

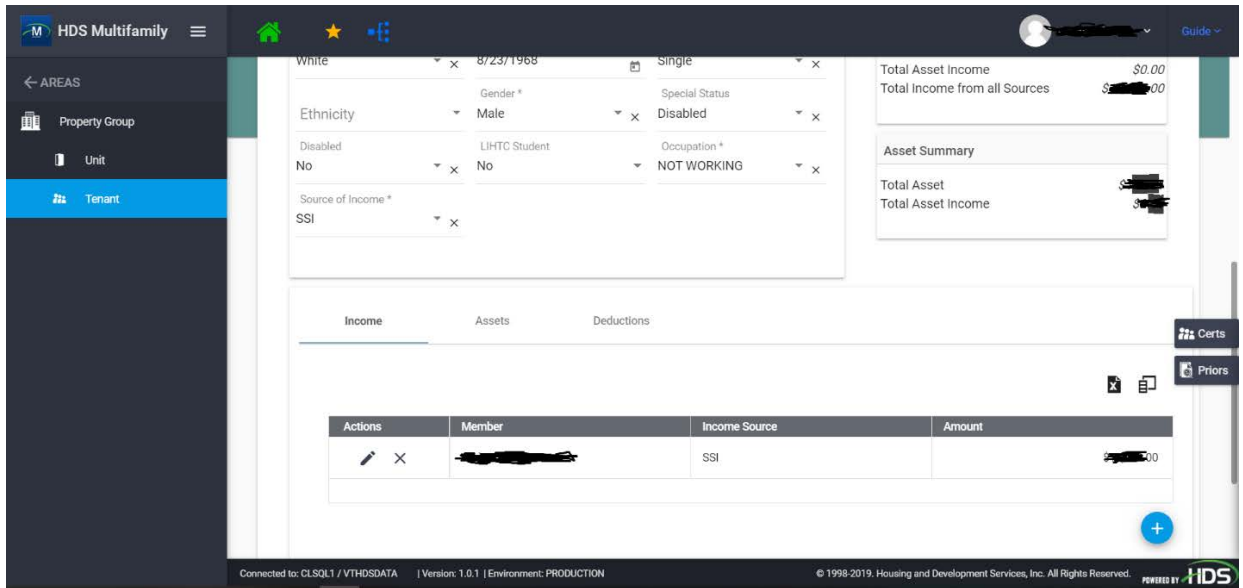
Member(s) List: [Redacted] Head of Household | 08/23/1968

Details		
First Name *	Middle Name	Last Name *
[Redacted]	[Redacted]	[Redacted]
Relationship *	Last 4 SSN *	Alien Reg. Number
Head of Household	[Redacted]	
Races *	Birth Date *	Marital Status
White	8/23/1968	Single
Gender *		Special Status

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

Income Summary	
Total Income	\$[Redacted].00
Total Asset Income	\$0.00
Total Income from all Sources	\$[Redacted].00

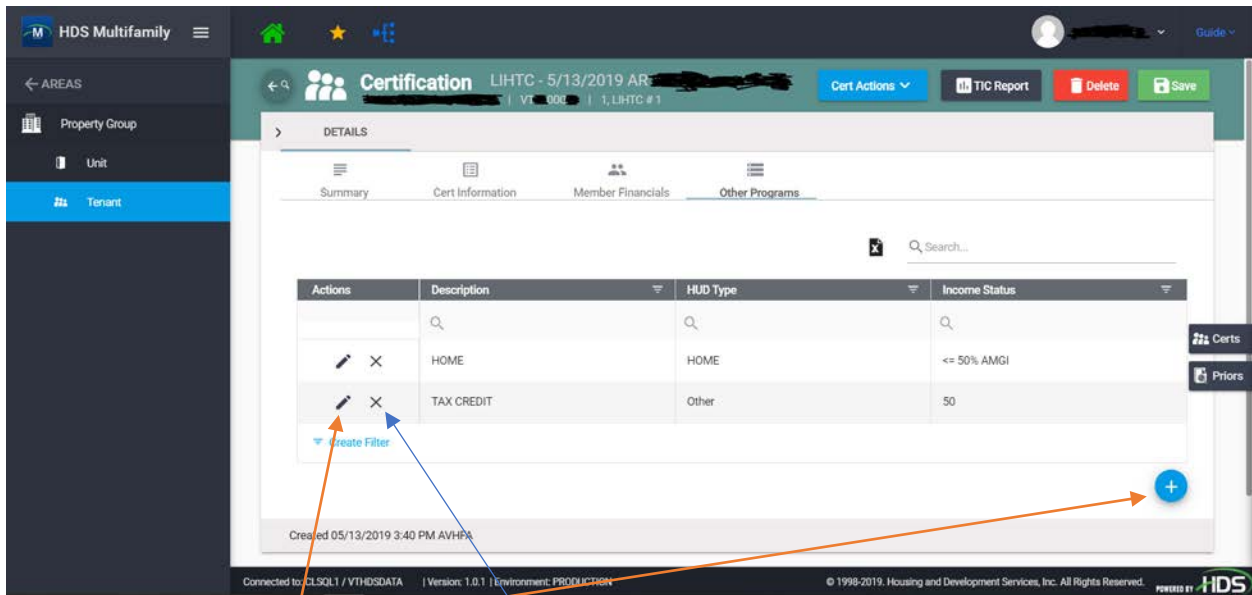
[Back to Table of Contents](#)



- 1 Click anywhere with a field header to enter data.
- 2 Scroll Down to complete entire screen
- 3 Scroll to top of screen; click green Save button

Other Programs screen:

You should not need to do anything on this screen UNLESS the funding status changes for the unit. For example: the unit was previously a tax credit unit and converts to a market rate unit or vice versa; Or the unit was previously a HOME unit but is no longer.



- To **Add**, click the blue plus sign
- To **Remove** a funding status, click the X next to the fund.
- To **Edit**, click the pencil next to the fund.

[Back to Table of Contents](#)

Edit Tax Credit screen:

Other Programs

Program *
TAX CREDIT

HUDType
Other

Income Status
50

OK Cancel

TAX CREDIT Other 50

Edit HOME screen:

Other Programs

Program *
HOME

HUDType
HOME

Income Status

Group Home	SRO Unit	Unit Type	HOME # HH Members
30 Percent Income Limit	Very Low Income Limit	60 Percent Income Limit	Low Income Limit
Tenant Rent	Market Rent	PJ Approved Max Rent	Utility Allowance
Annual Income	High or Low	Annual Income Type	Elderly Disabled Deduction
Dependent Deduction	Child Care Deduction	Medical Deduction	Disability Deduction
Adjusted Income	Assistance	Other Tenant Based Assist...	Other Project Based Assist...

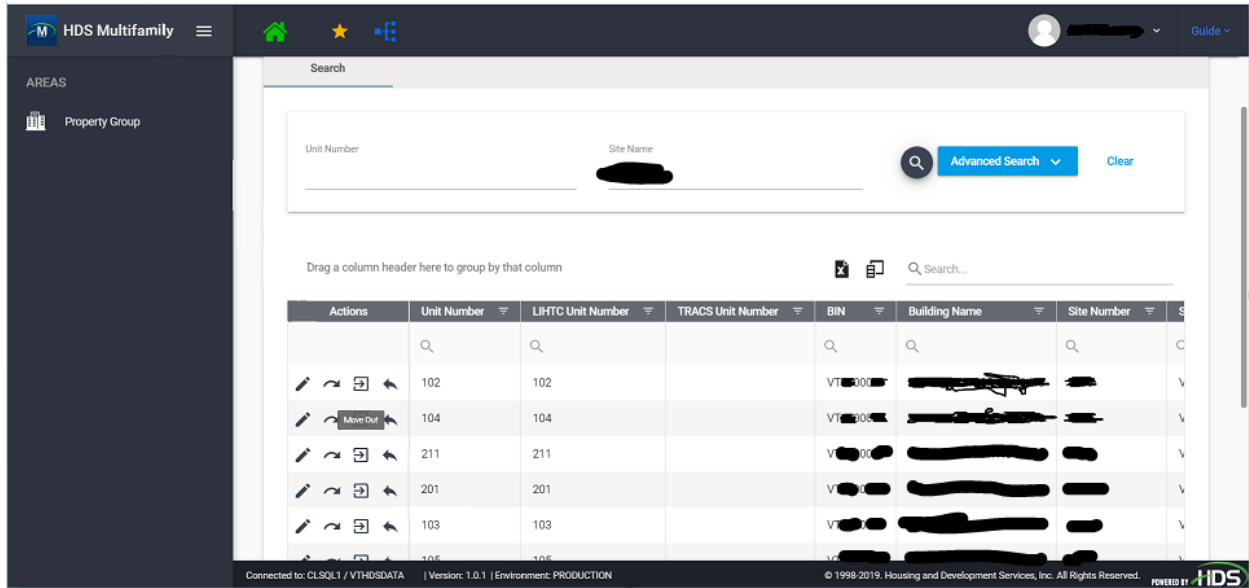
OK Cancel

Remember to save all work!

[Back to Table of Contents](#)

Move Out

1 Click Move Out icon next to unit



The screenshot shows the HDS Multifamily web application interface. The top navigation bar includes the HDS Multifamily logo, a home icon, a star icon, and a user profile icon. The left sidebar shows the 'AREAS' menu with 'Property Group' selected. The main content area features a search bar with 'Unit Number' and 'Site Name' fields, an 'Advanced Search' button, and a 'Clear' button. Below the search bar is a table with columns: Actions, Unit Number, LIHTC Unit Number, TRACS Unit Number, BIN, Building Name, and Site Number. The table contains several rows of unit data. The 'Move Out' icon (a square with a left-pointing arrow) is highlighted for the unit with Unit Number 104. The bottom of the page shows connection information: 'Connected to: CLSQL1 / VTHDSDATA | Version: 1.0.1 | Environment: PRODUCTION' and a copyright notice: '© 1998-2019, Housing and Development Services, Inc. All Rights Reserved.' The HDS logo is in the bottom right corner.

2 Enter effective date of move out



The screenshot shows a 'Move Out' form. The title 'Move Out' is at the top. Below it is the 'Effective Date*' field, which contains the date '1/1/2019'. A calendar icon is visible to the right of the date field. At the bottom right of the form are two buttons: 'Create Move Out' (blue) and 'Cancel' (red).

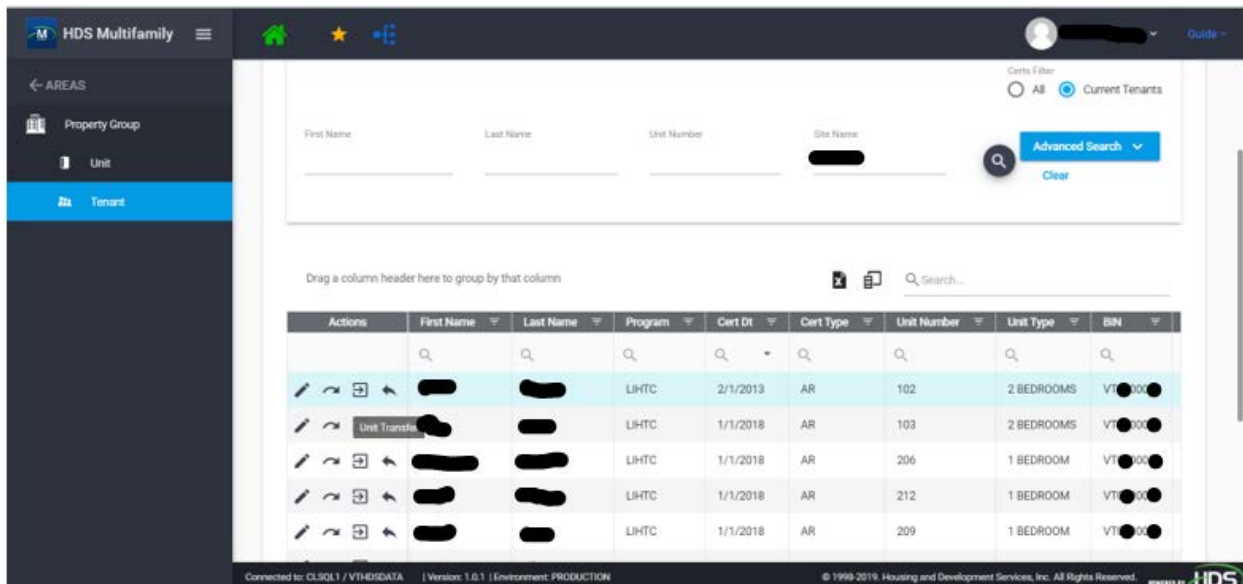
3 Click Create Move Out

4 Click Save

[Back to Table of Contents](#)

Unit Transfer - In

1 Click Unit Transfer icon



2 Click drop-down next to Transfer To *


3 Select Unit the tenant is transferring to

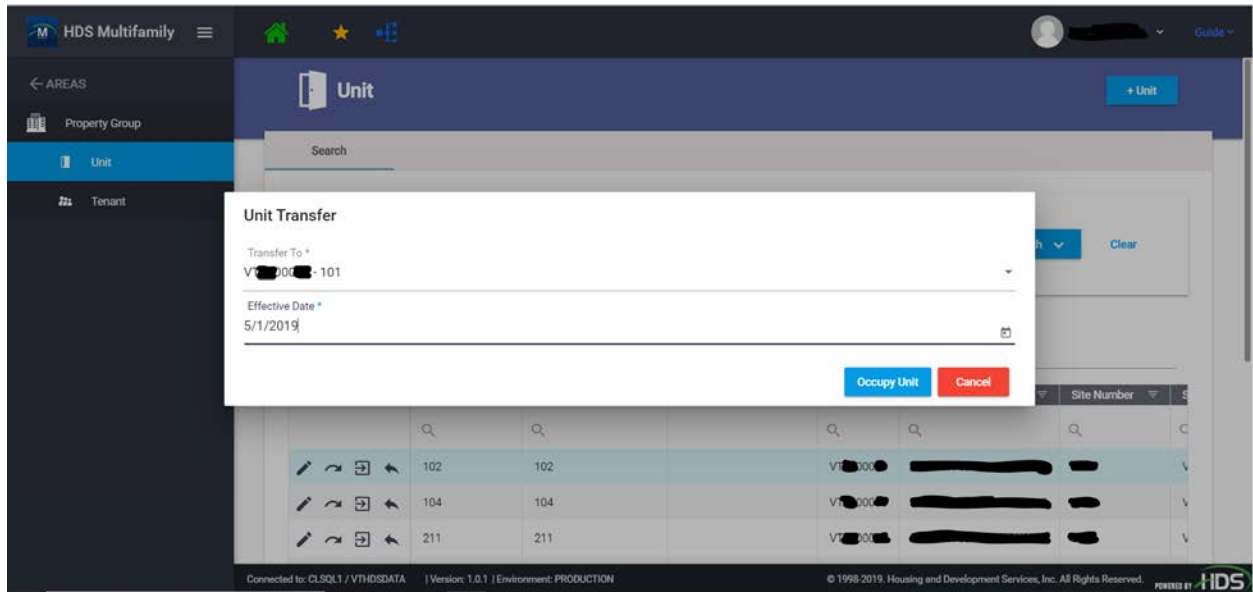
4 Enter Effective Date

5 Click Occupy Unit



Unit Transfer - Out

- 1 Click Unit Transfer icon next to unit 
- 2 Click the drop-down arrow next to Transfer To *
- 3 Select unit transferring to
- 4 Enter Effective Date
- 5 Click Occupy Unit



The screenshot displays the HDS Multifamily application interface. A modal window titled "Unit Transfer" is open, showing the following details:

- Transfer To ***: A dropdown menu with "V-000-101" selected.
- Effective Date ***: A date field containing "5/1/2019".
- Buttons**: "Occupy Unit" (blue) and "Cancel" (red).

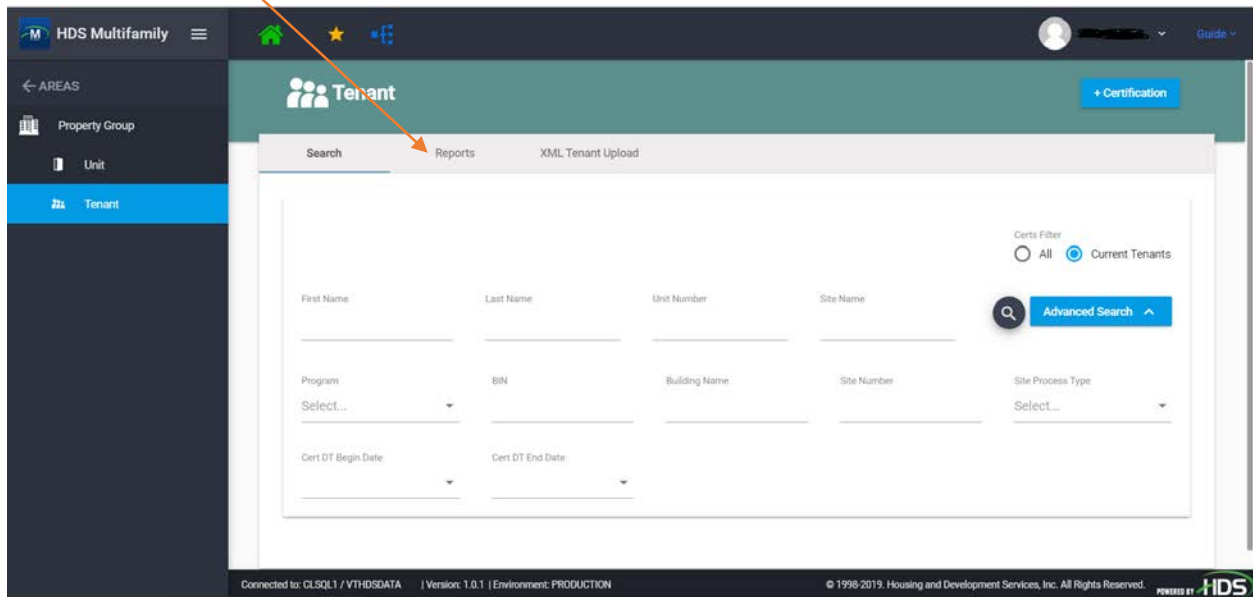
The background shows a table of units with columns for unit number, site number, and status. The footer includes the following text:

Connected to: CLSQL1 / VTHDSDATA | Version: 1.0.1 | Environment: PRODUCTION
© 1998-2019, Housing and Development Services, Inc. All Rights Reserved. POWERED BY HDS

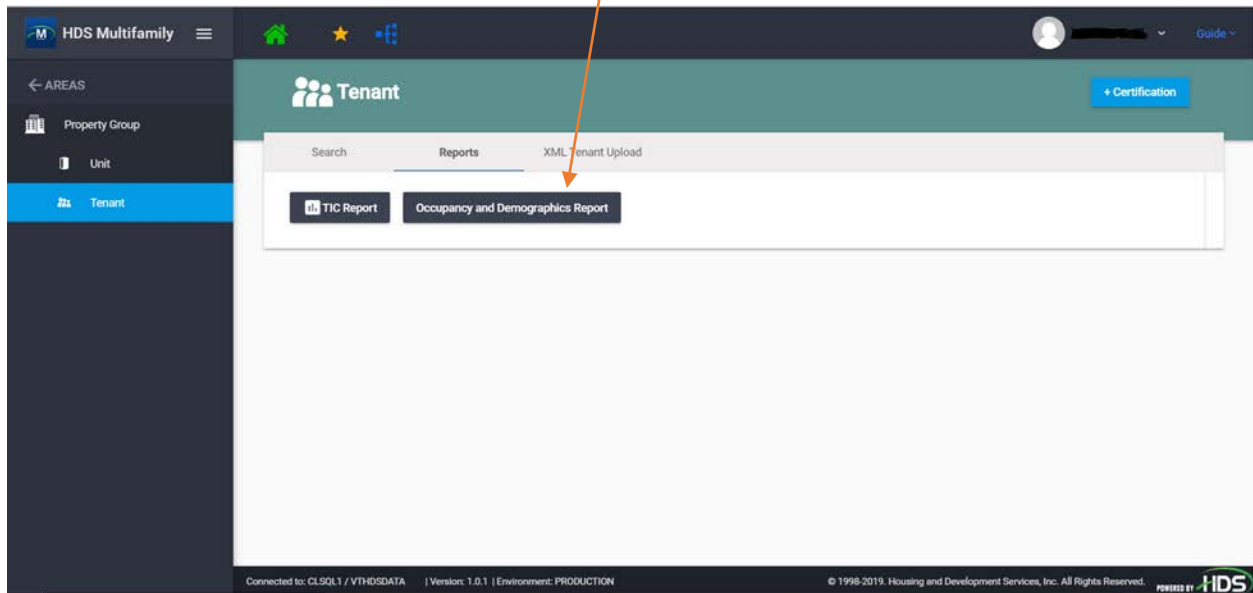
Reports

Occupancy & Demographics Report

- 1 Log in to HDS NextGen
- 2 Click Property Group on left toolbar
- 3 Click Tenant
- 4 Click Reports



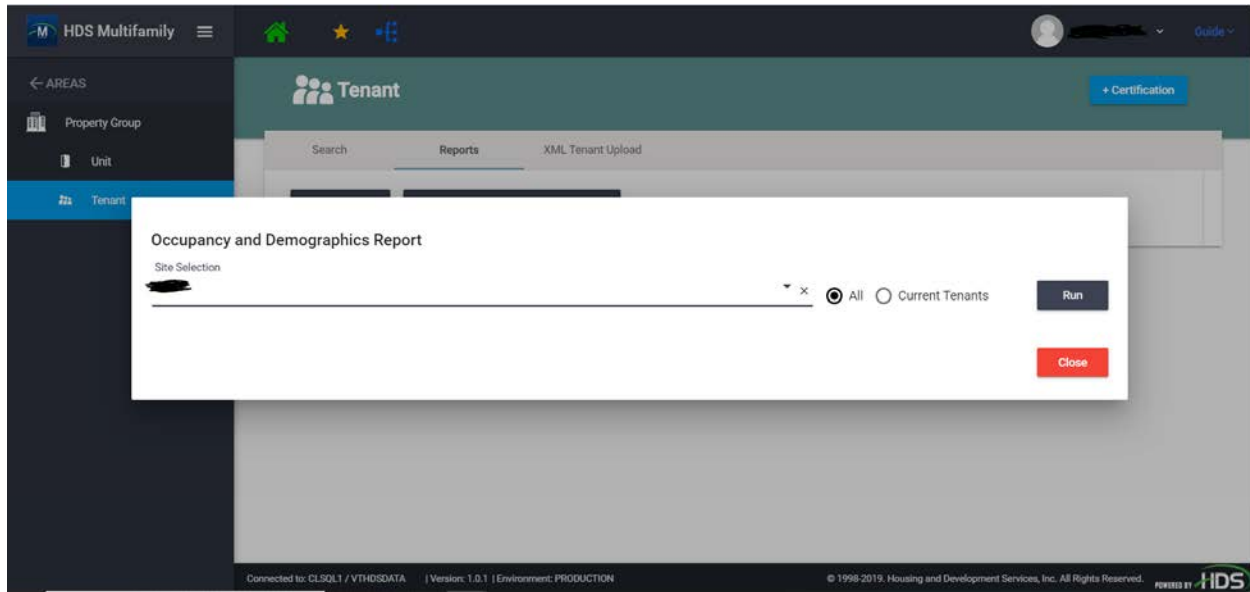
- 5 Click Occupancy and Demographics Report



- 6 Use the drop-down arrow to select your site.
- 7 Choose All or Current Tenants

[Back to Table of Contents](#)

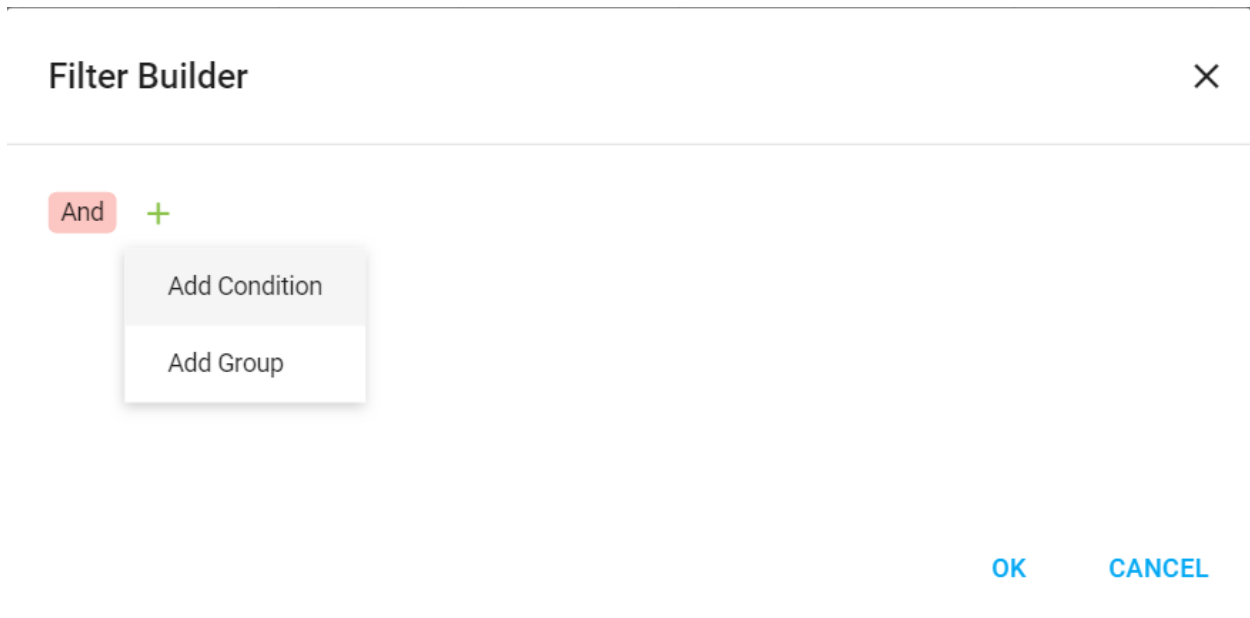
8 Click Run



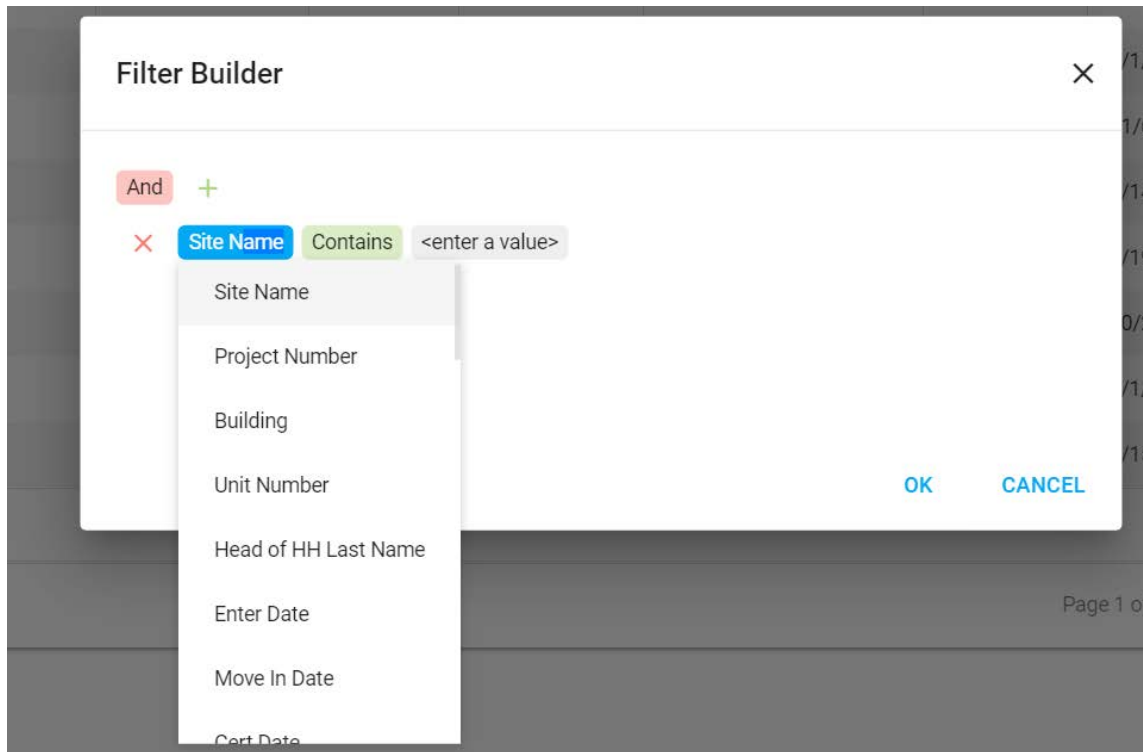
9 Scroll to bottom

10 Create Filter

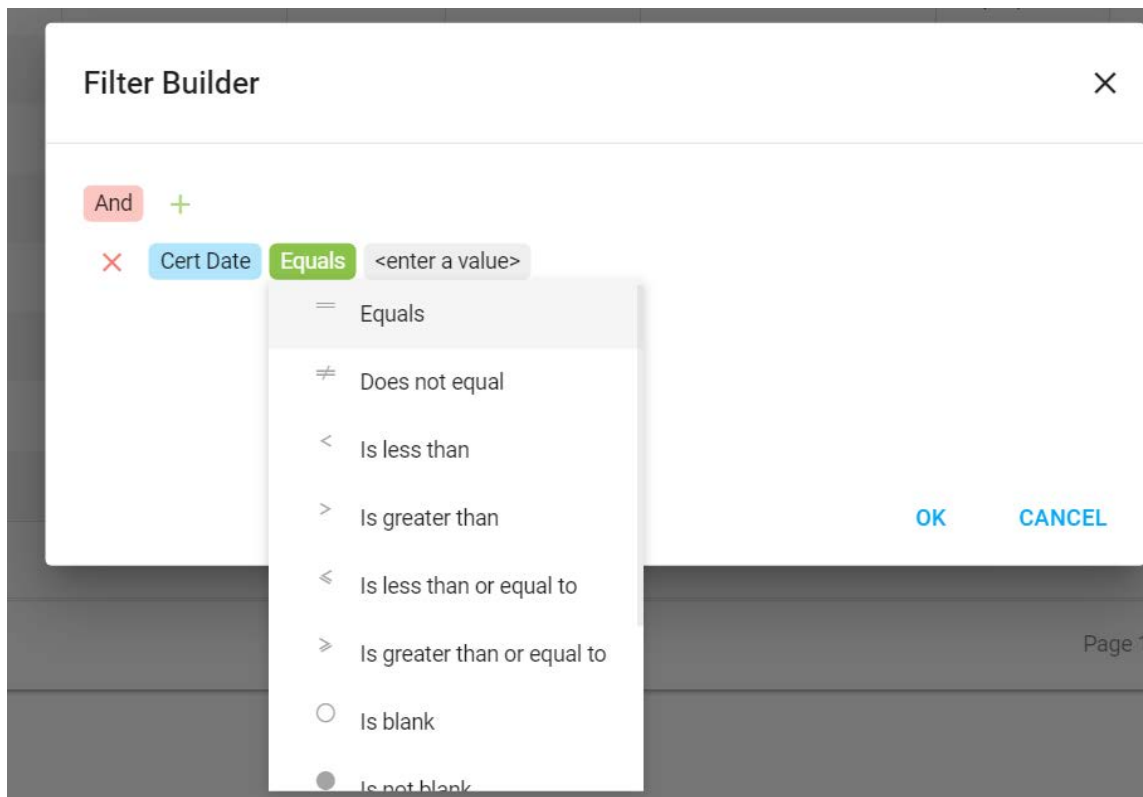
11 Click green arrow – Add Condition



12 Change Site Name to Cert Date



13 Change Equals to Is greater than or equal to



[Back to Table of Contents](#)

¹⁴ Enter value – usually January 1st of calendar year you want to see reported

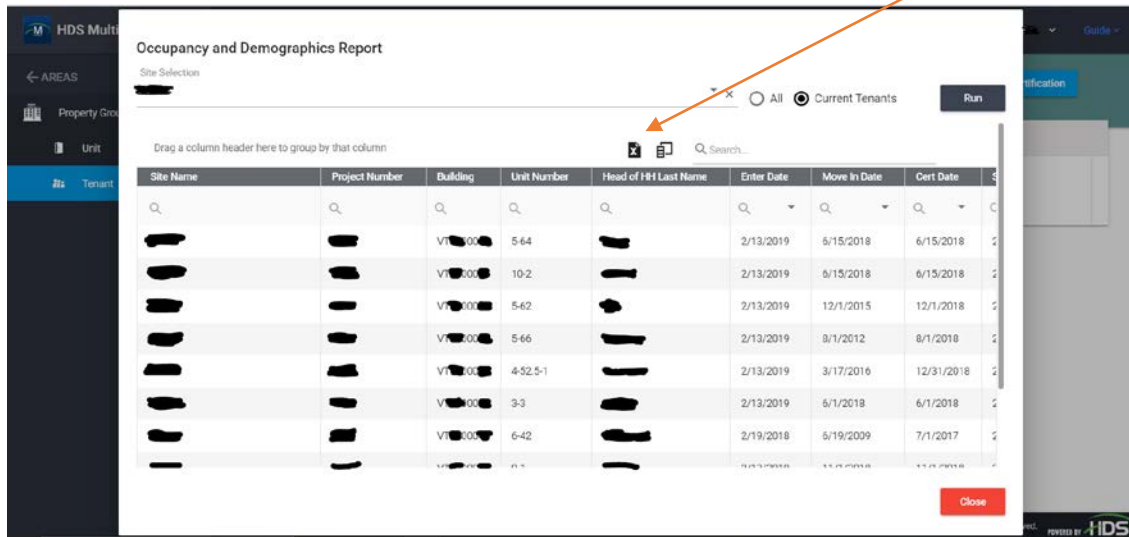
The screenshot shows a 'Filter Builder' dialog box with a close button (X) in the top right corner. Below the title bar, there is a red 'And' button and a green '+' button. A single condition is displayed: a red 'X' button, a blue 'Cert Date' button, a green 'Is less than or equal to' button, and a text input field containing '1/1/2018'. An orange arrow points to the green '+' button. At the bottom right, there are 'OK' and 'CANCEL' buttons.

¹⁵ Click green + to add another Condition

The screenshot shows the 'Filter Builder' dialog box with two conditions. The first condition is 'Cert Date Is less than or equal to 1/1/2018' and the second is 'Cert Date Is less than or equal to 12/31/2018'. Both conditions have a red 'X' button to their left. The green '+' button is still visible above the conditions. The 'OK' and 'CANCEL' buttons are at the bottom right.

¹⁶ Click Ok

Helpful Hint: The system allows you to export the results to Excel if you choose



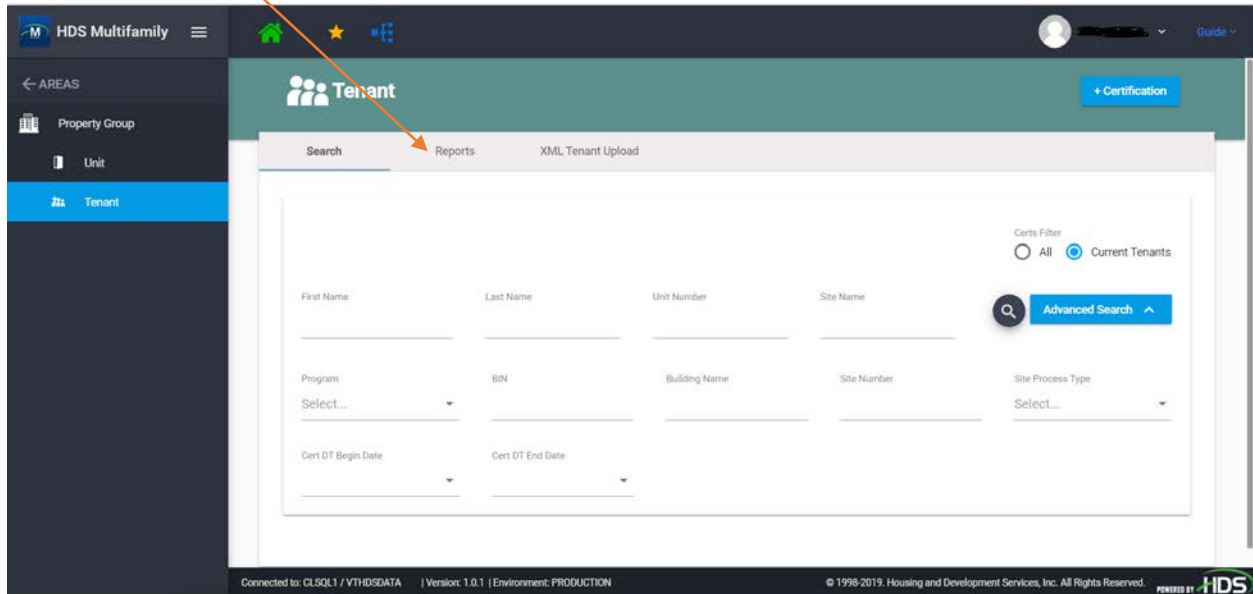
The screenshot shows a web application interface for an 'Occupancy and Demographics Report'. The interface includes a sidebar on the left with navigation options like 'AREAS', 'Property Group', 'Unit', and 'Tenant'. The main content area has a 'Site Selection' dropdown, a 'Run' button, and radio buttons for 'All' and 'Current Tenants'. Below this is a table with columns: Site Name, Project Number, Building, Unit Number, Head of I&I Last Name, Enter Date, Move In Date, and Cert Date. An orange arrow points to an Excel export icon (a document with an 'X') located above the table headers. A 'Close' button is visible in the bottom right corner of the report area.

Site Name	Project Number	Building	Unit Number	Head of I&I Last Name	Enter Date	Move In Date	Cert Date
[REDACTED]	[REDACTED]	VITCO	5-64	[REDACTED]	2/13/2019	6/15/2018	6/15/2018
[REDACTED]	[REDACTED]	VITCO	10-2	[REDACTED]	2/13/2019	6/15/2018	6/15/2018
[REDACTED]	[REDACTED]	VITCO	5-62	[REDACTED]	2/13/2019	12/1/2015	12/1/2018
[REDACTED]	[REDACTED]	VITCO	5-66	[REDACTED]	2/13/2019	9/1/2012	8/1/2018
[REDACTED]	[REDACTED]	VITCO	4-52.5-1	[REDACTED]	2/13/2019	3/17/2016	12/31/2018
[REDACTED]	[REDACTED]	VITCO	3-3	[REDACTED]	2/13/2019	6/1/2018	6/1/2018
[REDACTED]	[REDACTED]	VITCO	6-42	[REDACTED]	2/19/2018	5/19/2009	7/1/2017

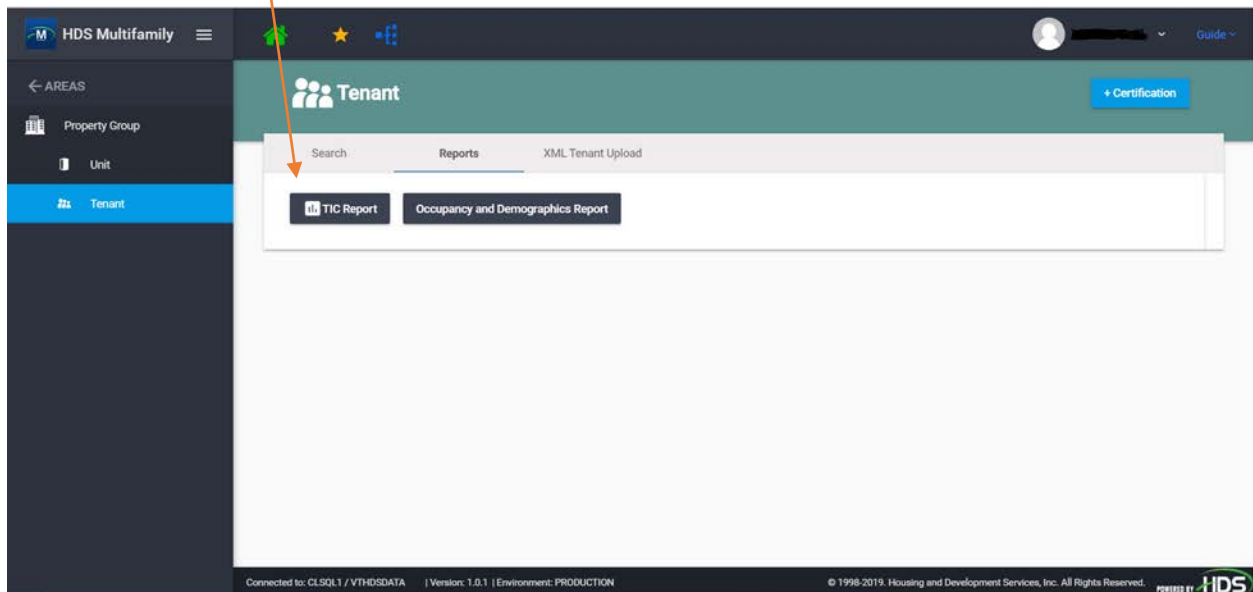
[Back to Table of Contents](#)

TIC Report

- 1 Log in to HDS NextGen
- 2 Click Property Group on left toolbar
- 3 Click Tenant
- 4 Click Reports



- 5 Click TIC Report



[Back to Table of Contents](#)

6 Enter Site Number then click Search

Connected to: CLSQL1 / VTHDSDATA | Version: 1.0.1 | Environment: PRODUCTION | © 1998-2019, Housing and Development Services, Inc. All Rights Reserved. POWERED BY HDS

7 Click on Unit number

8 Click Create Report

First Name	Last Name	Program	Cert Dt	Cert Type	Unit Number	LIHTC Unit Number	TRACS Unit Number	Unit Type
[REDACTED]	[REDACTED]	LIHTC	2/1/2013	AR	102	102		2 BEDRO
[REDACTED]	[REDACTED]	LIHTC	1/1/2018	AR	103	103		2 BEDRO
[REDACTED]	[REDACTED]	LIHTC	1/1/2018	AR	206	206		1 BEDRO
[REDACTED]	[REDACTED]	LIHTC	1/1/2018	AR	212	212		1 BEDRO
[REDACTED]	[REDACTED]	LIHTC	1/1/2018	AR	209	209		1 BEDRO

Connected to: CLSQL1 / VTHDSDATA | Version: 1.0.1 | Environment: PRODUCTION | © 1998-2019, Housing and Development Services, Inc. All Rights Reserved. POWERED BY HDS

9 Once the report appears you can either print or download as a PDF

[Back to Table of Contents](#)

Glossary

Term	Definition
BIN	Building Identification Number
Cert Types	
AR	Annual Recertification
IR	Interim Recertification
MI	Move In
MO	Move Out
UT	Unit Transfer
UT-I	Unit Transfer In
HDS	Housing and Development Software
LIHTC	Low Income Housing Tax Credit
Site	formerly called Property
TIC	Tenant Income Certification
TRACS	Tenant Rental Assistance Certification System