New User

1 Click [https://vt.hdsoftware.net/WebCompliance/Login/Login?ReturnUrl=%2fWebCompliance](https://vt.hdsoftware.net/WebCompliance/Login/Login?ReturnUrl=%2fWebCompliance)

2 Click Register

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

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.

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Logging in

1 Open HDS portal [https://vt-portal.hdsoftware.net/auth/login](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

![Login page](image)
Logging Out

1. Click drop-down arrow next to your user name

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

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
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.
Unit

1. Click Property Group on left toolbar

2. Click Unit

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
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.
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
3. Click Save
Tenant
1 Click Property Group on left toolbar
2 Click Tenant
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

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

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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

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8 Click Certs on right side.

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

Tenant name

Site name

Building number

Unit number
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
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
Manual

Recertification

1 Log in to HDS NextGen
2 Click Property Group on left toolbar
3 Click Tenant
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 You should see several Actions available

8 Click the RECERTIFY arrow

9 Click drop-down arrow next to Certification Type *

10 Select Recertification

11 Enter Effective date of recertification

12 Click Create Recertification
Click on Cert Information

Summary screen:

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

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:
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.

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Edit Tax Credit screen:

![Edit Tax Credit screen](image1)

Edit HOME screen:

![Edit HOME screen](image2)

Remember to save all work!

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Move Out

1. Click Move Out icon next to unit

2. Enter effective date of move out

3. Click Create Move Out

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

15 Click green + to add another Condition

16 Click Ok
Helpful Hint: The system allows you to export the results to Excel if you choose.
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
6 Enter Site Number then click Search

7 Click on Unit number

8 Click Create Report

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

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