FOCUS Software Property Manager User's Guide

June 2017

Housing Compliance Services

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Walnut Creek, CA 94597

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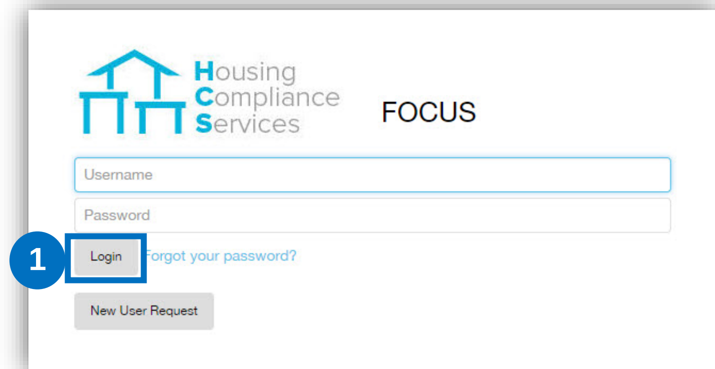
Accessing FOCUS

Login to FOCUS

A username and password will be provided to you by a representative at Housing Compliance Services.

Go to www.housingcompliance.org/FOCUS

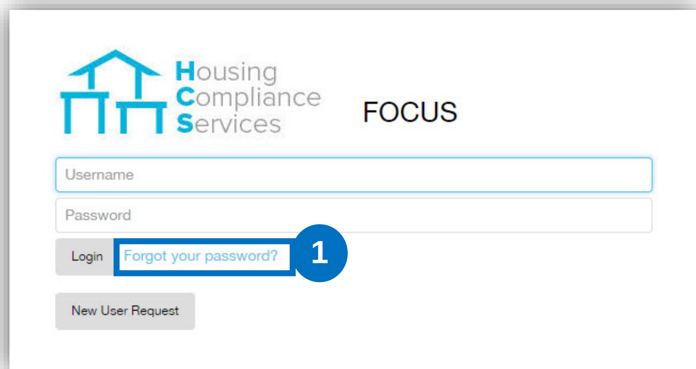
❶ Enter the username and password you were provided and then click **LOGIN**.

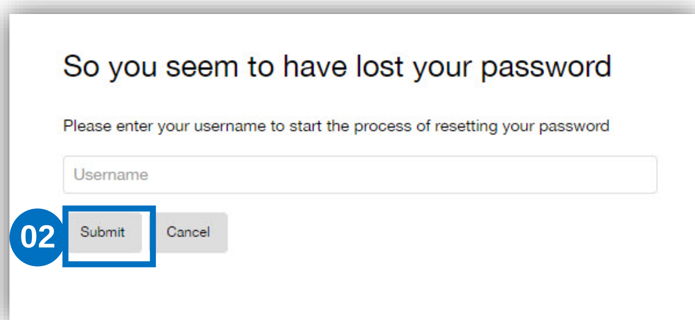


Lost Password

❶ Click **Forgot your password?** on the Login screen

❷ You will be prompted to enter your username then click **Submit**. This will start the process of resetting your password.

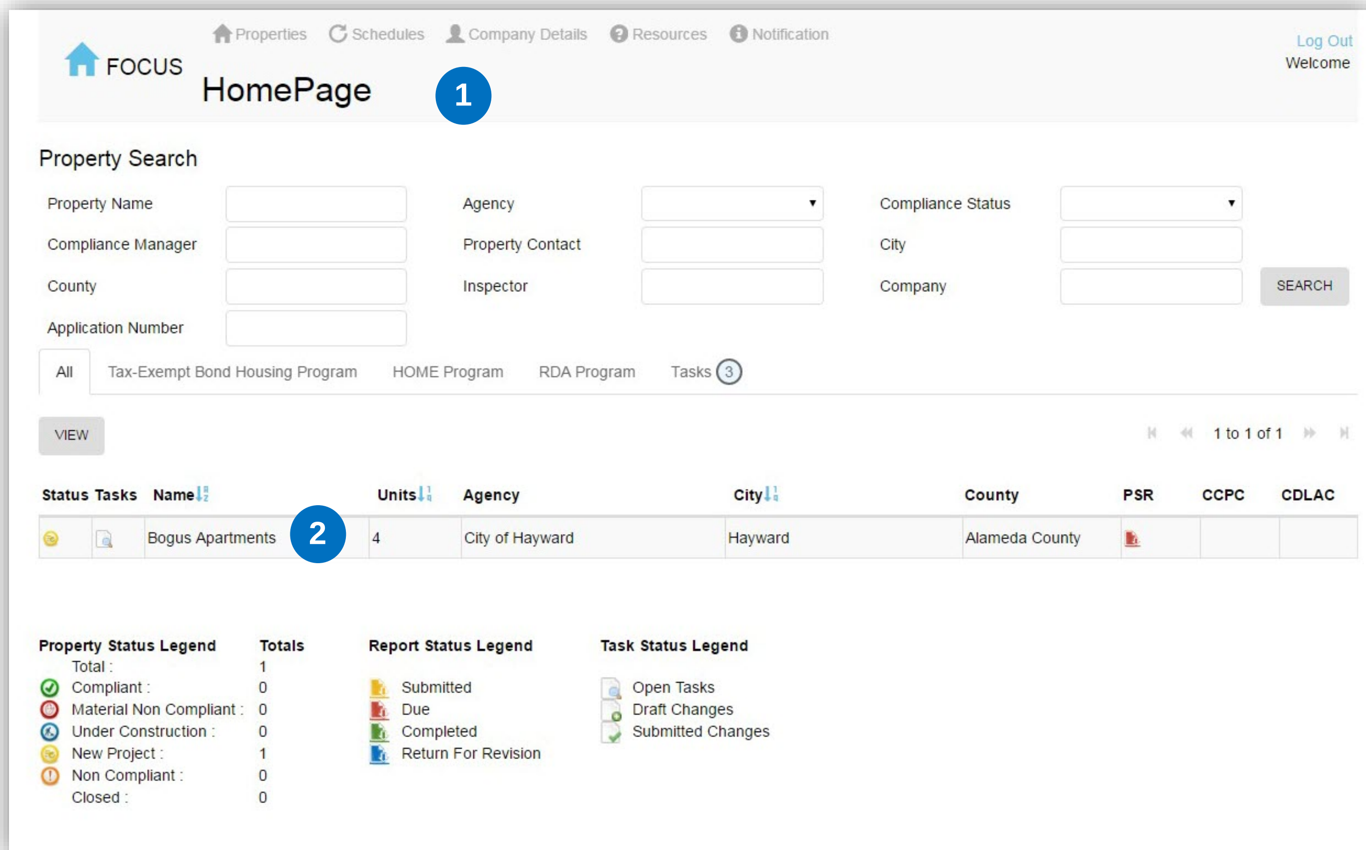




FOCUS Homepage

❶ After logging in, you will be sent to the FOCUS Homepage. This page is the management dashboard for the housing portfolio and is the starting point for accessing the property information. All the properties assigned to your user name will be displayed on the homepage.

❷ To choose a specific property, double-click on the "Name" of the property in the matrix shown below. Once you double-click the specific property you will then be redirected to the Property Compliance Summary page.



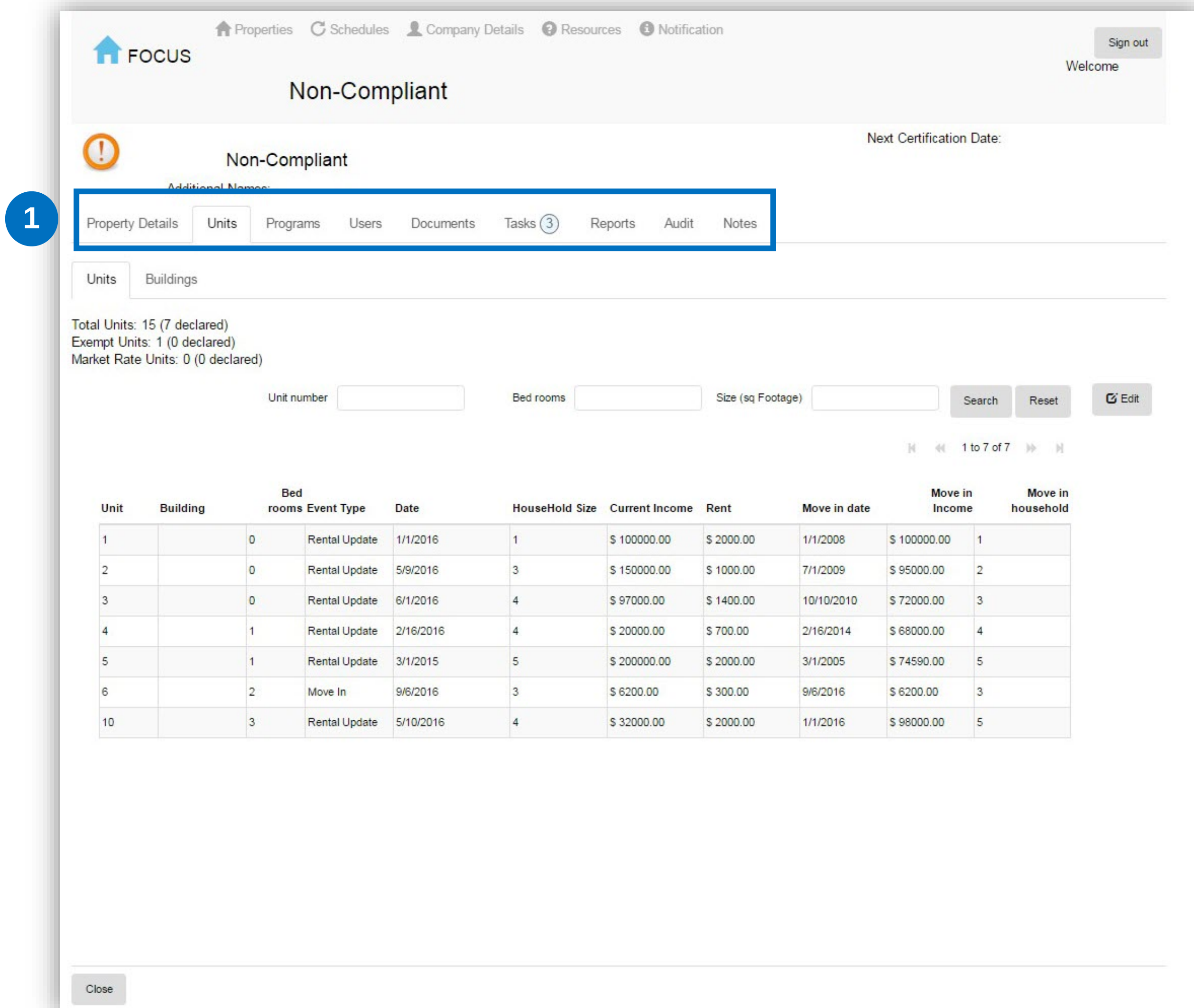
Property Compliance Summary

Once in the Property Compliance Summary page you will see a total of nine (9) different tabs to select.

The different tabs are as follows:

- Property Details
- Units
- Programs
- Users
- Documents
- Tasks
- Reports
- Audit
- Notes

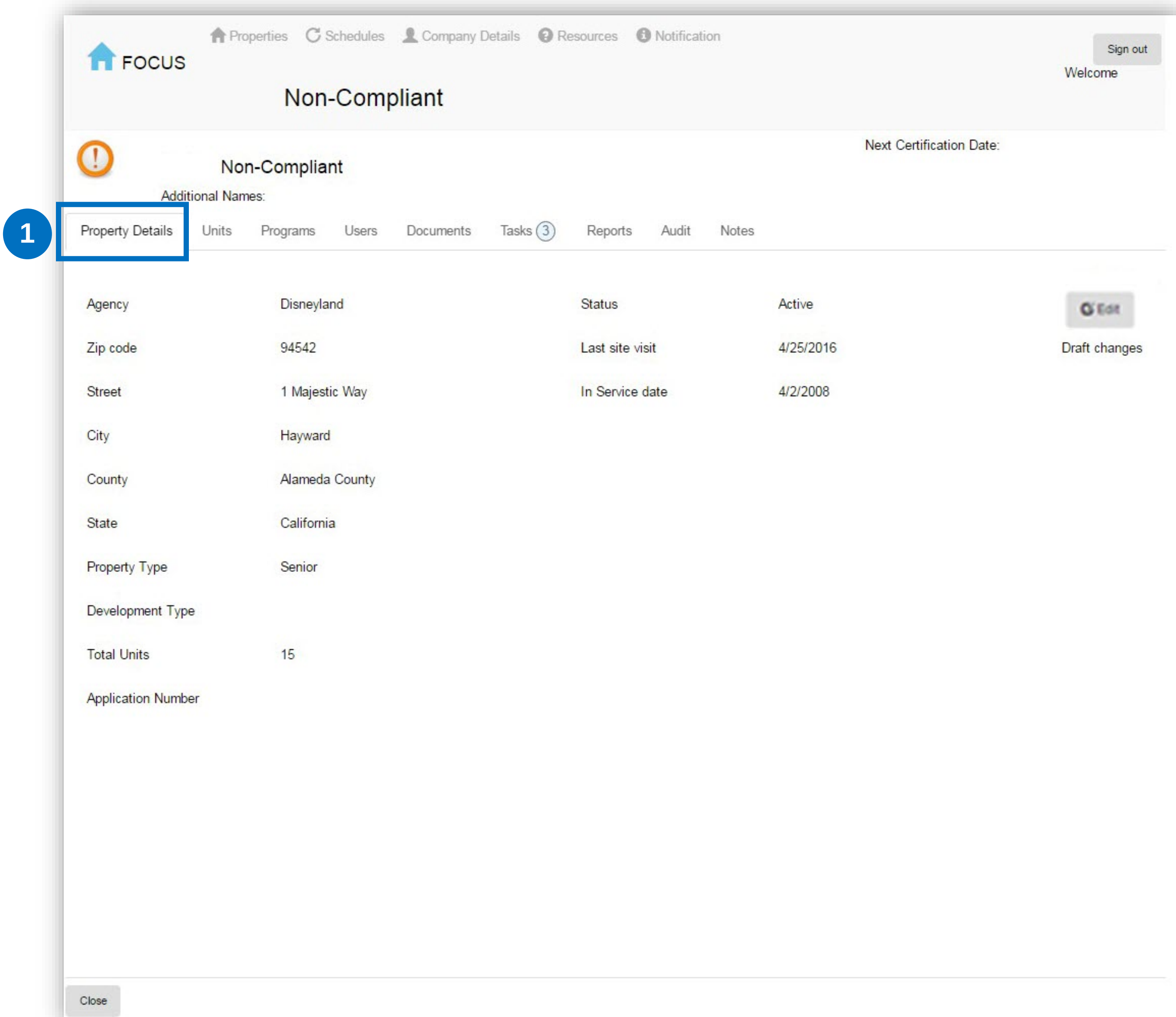
❶ Each tab will need to be clicked to access the information on that tab.



Property Details Tab

❶ Click on the **Property Details** tab to view the general information of the selected property. Information included under Property Details:

- Agency name
- Address
- Property type
- Development type
- In service date
- Current status



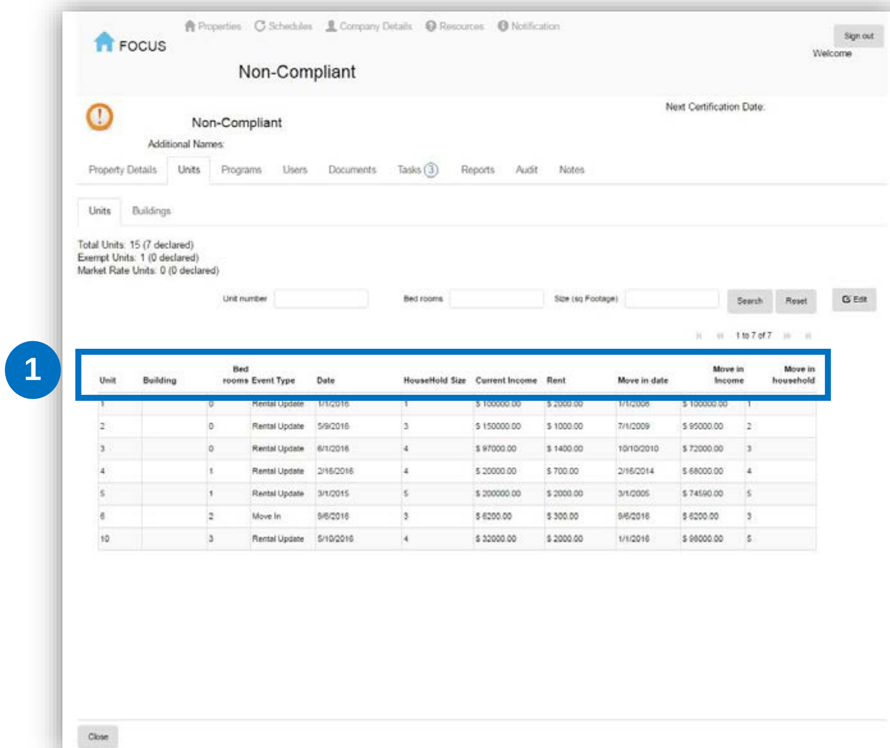
Units Tab

When selecting the **Units** tab, you will see that there are two different tabs that you are able to view:

- Units
- Buildings

❶ Within the units tab, you will see the following property information:

- **Unit** – Unit number
- **Building** – Building letter or number.
- **Bedrooms** – The number of bedrooms within the unit.
- **Event Type** – The type of event associated with the unit. Options are Move In, Move Out and Rental Update.
- **Date** – The date in which the event type occurred.
- **Household Size** – The current number of people/tenants in the household.
- **Current Income** – The current annual income of the household.
- **Rent** – The amount of rent paid on a monthly basis.
- **Move In Date** – The date the household moved into the unit.
- **Move In Income** – The amount of income earned by household at date of move in.
- **Move In Household** – The number in the household at move in.



Editing Units

Property Managers will need to edit a unit record when an Event occurs. The different types of events are:

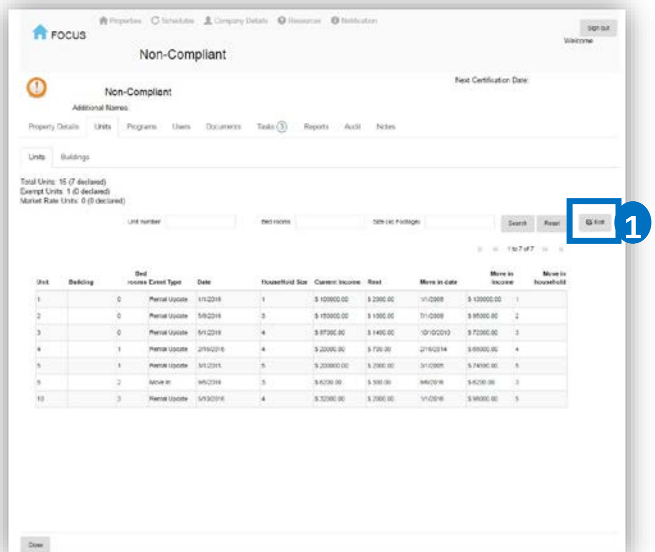
- **Move In**
- **Move Out**
- **Rental Update**
    - Rent change
    - Income change
    - Household size adjustment
    - Recertification

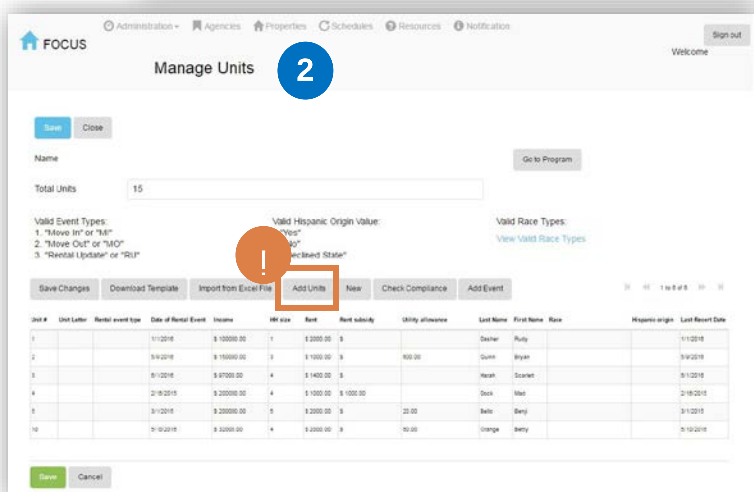
NOTE: A Move In and Move Out event will only occur once per household. All other changes to the unit will be recorded by entering a Rental Update as identified in the bullets above. To edit an Event, jump to Editing Units – Adding Event.

❶ To begin editing unit records, click the **Edit** button on the Units tab.

❷ This will open up a new screen for Managing Units. You will be able to edit the following information:

- **Bedrooms** – The number of bedrooms within the unit
- **Event Type** – The type of event associated with the unit. Options are Move In, Move Out and Rental Update.
- **Date** – The date in which the event type occurred.
- **Household Size** – The current number in the household.
- **Current Income** – The current annual income provided.
- **Rent** – The amount of rent paid on a monthly basis.
- **Utility Allowance** – The cost to provide monthly assistance in making monthly utilities reasonable.
- **Rent Subsidy** –The portion of rent subsidized on a monthly basis.





! The **Add Units** button will enable Property Managers or the Compliance Administrator to import multiple units in a batch. This is a one-time event to create the units listed within the property.

Editing Units – Adding Events

To begin adding a new event to a unit:

❶ Click on the unit to be edited

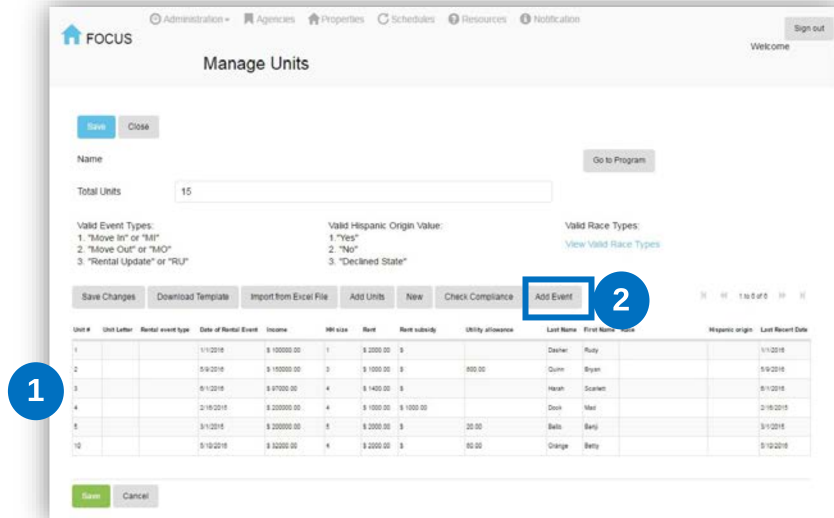
❷ Click the **Add Event** button.

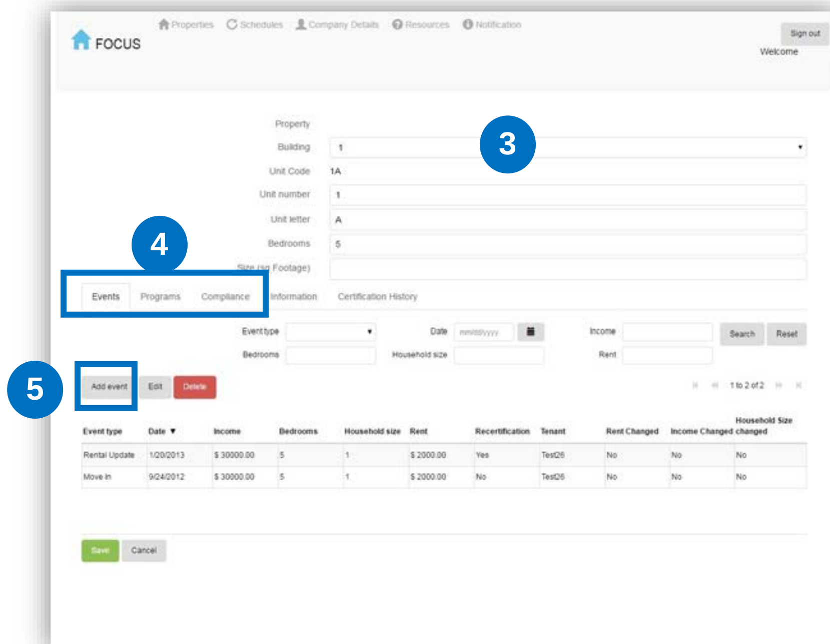
❸ A new window will open to the **Unit Summary** page with event information and to edit the event.

❹ Details of the individual unit are available to view, including:

- **Events** tab – View historical events related to the unit and Add Events
- **Programs** tab – Programs and set-asides associated with the unit (ie HOME, RDA, Bond)
- **Compliance** tab – Current compliance status of the unit

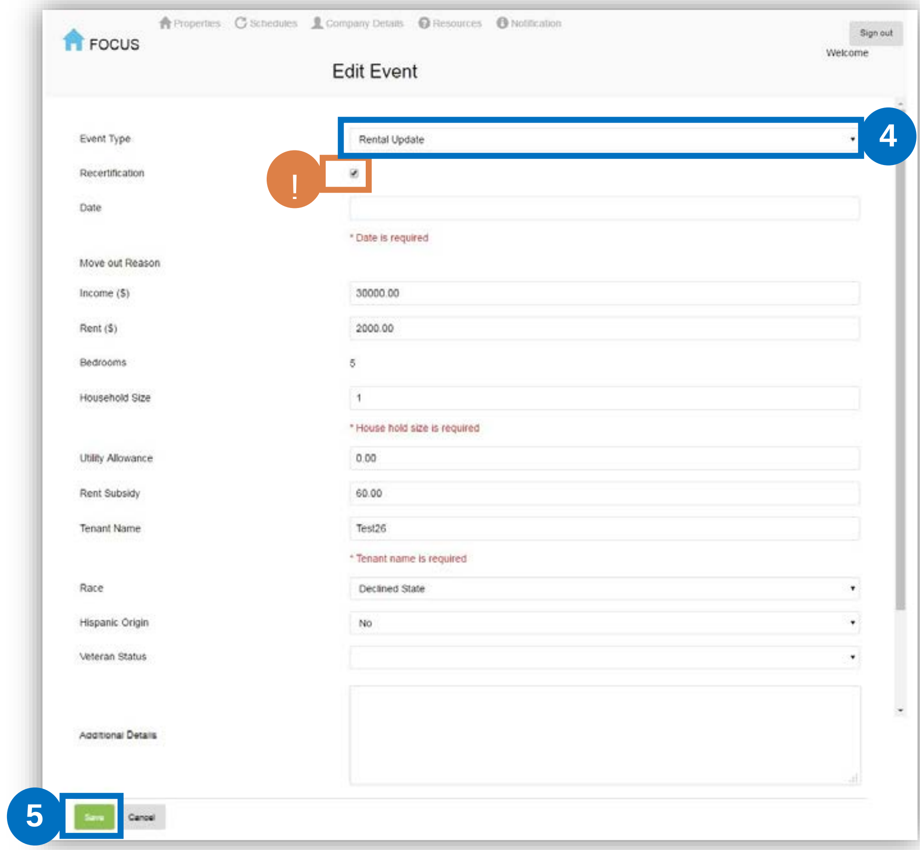
❺ To update a unit, click the **Add Event** button. A new screen will open.





❹ Select the event type from the Event Type dropdown. Once you select your Event Type (Move In, Move Out or Rental Update), additional fields will appear on the screen. These fields will be required when creating an event:

- **Event Type** – The type of event associated with the unit. The selection of events are Move In, Move Out and Rental Update.
- **Date** – The date in which the event occurred.
- **Current Income** – The current annual income.
- **Rent** – The amount of rent paid on a monthly basis (tenant portion) – Utility Allowance and Rent Subsidy, if applicable.
- **Household Size** – The number of people living in the unit.
- **Tenant Name** – Head of Household.



! ***If you are entering a recertification, be sure to check the "recertification" box at the top of the screen immediately above the date.***

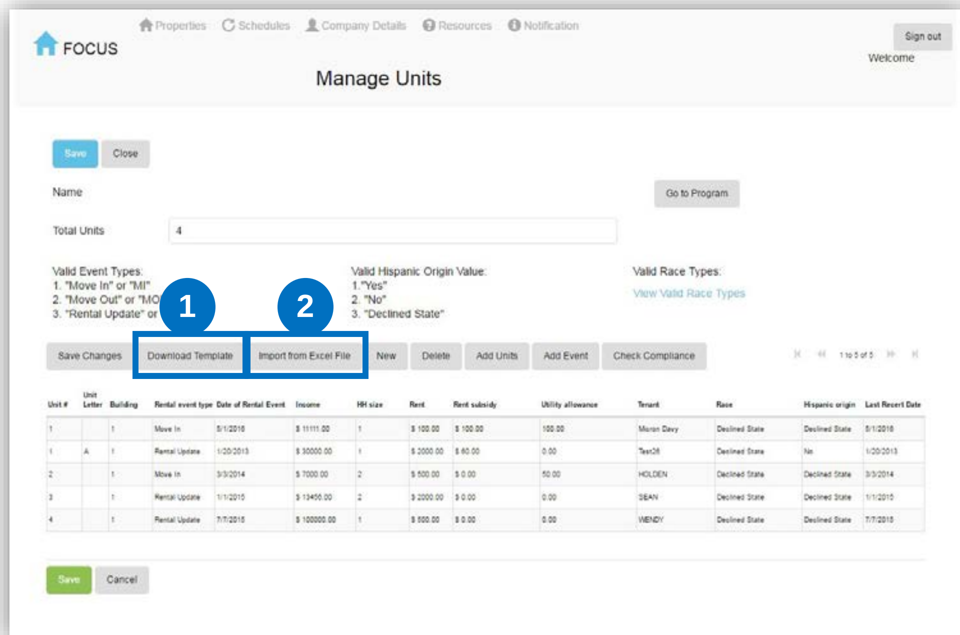
❺ When the updates have been completed, click the **Save** button.

Once you click **Save**, you will be redirected back to the Unit Summary page. Click the **Save** button on the Unit Summary page to return to the Manage Units tab.

Editing Units – Upload Tenant Data

Mass upload your tenant data by using an Excel template. In order upload tenant data, you will need be in the **Manage Units** screen (click Edit on the Units tab to access).

To upload a template follow this process:



❶ In the Manage Units Screen, click the **Download Template** button.

- This will download an excel template, save this to your computer.
- Edit the excel file to include these unit updates
  - Move-in
  - Move-Out
  - Rental Event
    - Income
    - Rent
    - Household Size
    - Recert date
- Once you are done editing save the excel file.

❷ Import the excel file by clicking the **Import Excel File** button.

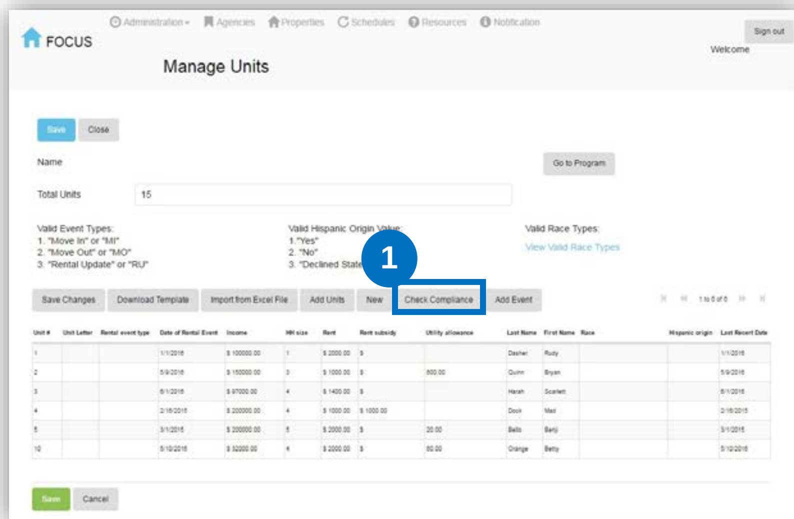
- Select the file to upload from your saved documents and click Continue
- Review Lines to be imported and click Continue
- Import

Checking Compliance and Creating a Project Status Report (PSR)

In order to check the compliance of the programs or create a PSR, you will need be in the **Manage Units** screen. You get to this screen by doing the following:

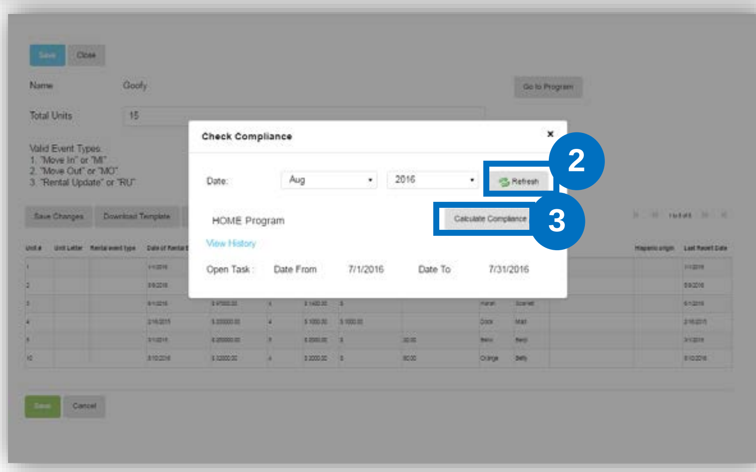
- Select the initial property in which the PSR report will be created.
- Click on the **Units** tab and click the edit button.

Checking Compliance



❶ Once in the Manage Units screen, click the **Check Compliance** button

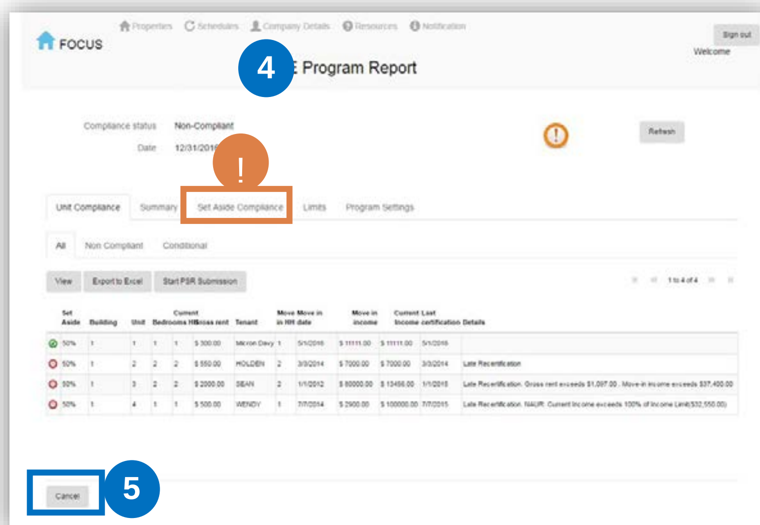
❷ A pop-up window will ask the due date for the report. Enter the information and click **Refresh**.



❸ If you have more than one program you will be asked to choose the compliance program for which you want to run the report. Click **Calculate Compliance** button.

❹ A new screen will open to the **Program Report**. The default view is the Unit Compliance tab which shows all units and their compliance status.

❺ To edit any of the units, click on the **Cancel** button to close this screen and return to the **Units** tab on the **Manage Units** screen



! Click the **Set-Aside Compliance** tab to receive a summary of the number of units that are in compliance and how many are required for each set aside.

Creating a Project Status Report (PSR)

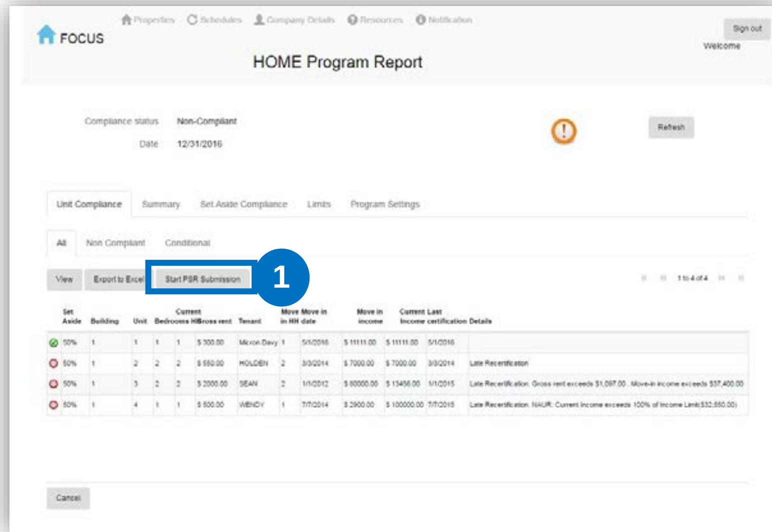
❶ After you have reviewed the Compliance Report, from the Program Report screen, click the **Start PSR Submission** button.

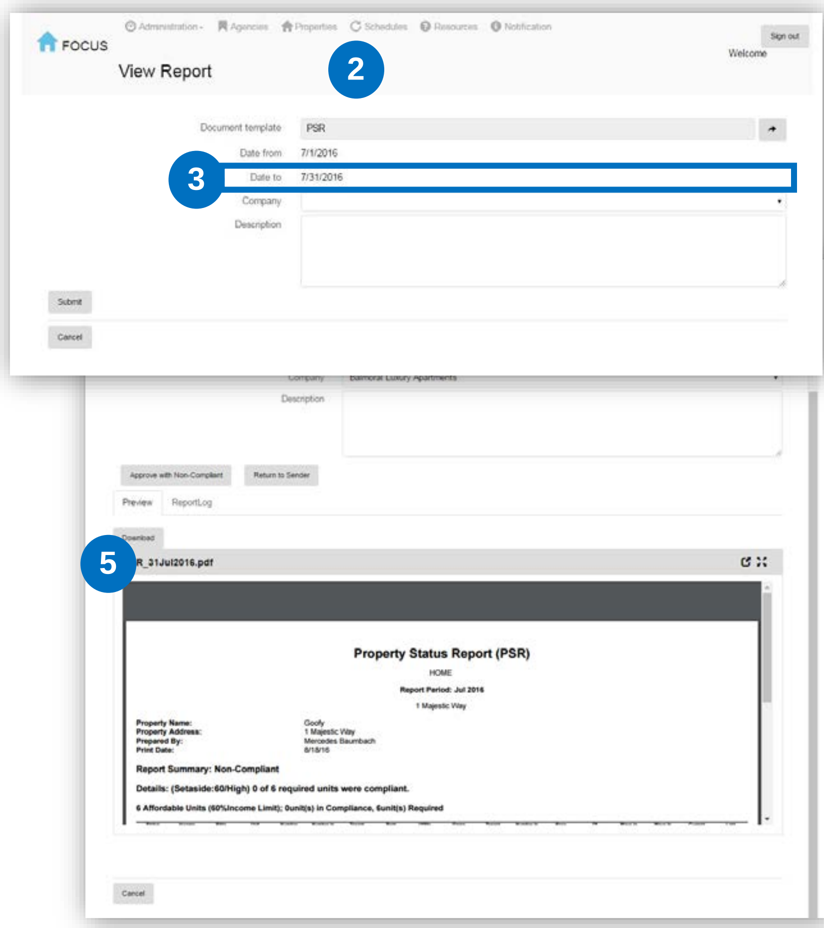
❷ You will be taken to the View Report screen.

❸ Confirm the date range for the report you are running and choose your company from the dropdown menu.

❹ Click **Submit.**

❺ The PSR will be generated in PDF format and is automatically saved. The report Task will be marked complete. The report will also be sent to the Agency for review. Once the Agency reviews and accepts it as complete, you will receive an email.





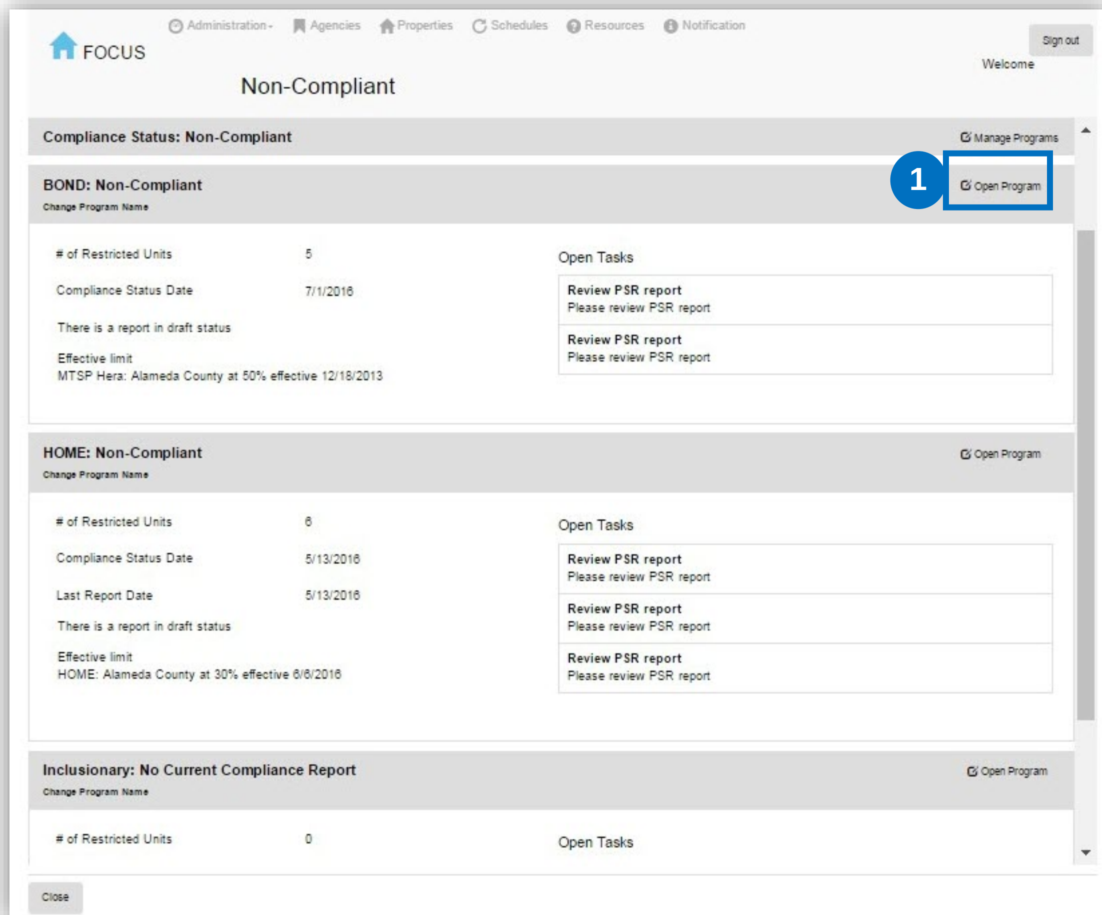
Programs Tab

The Programs tab enables users to see the individual regulatory programs being monitored for each property. In the example, the programs being monitored are “Bond,” “Home” and “Inclusionary.”

❶ In order to open up a program, the **Open Program** selection will need to be clicked.

Once **Open Program** has been selected, you will be able to view the Program details which includes:

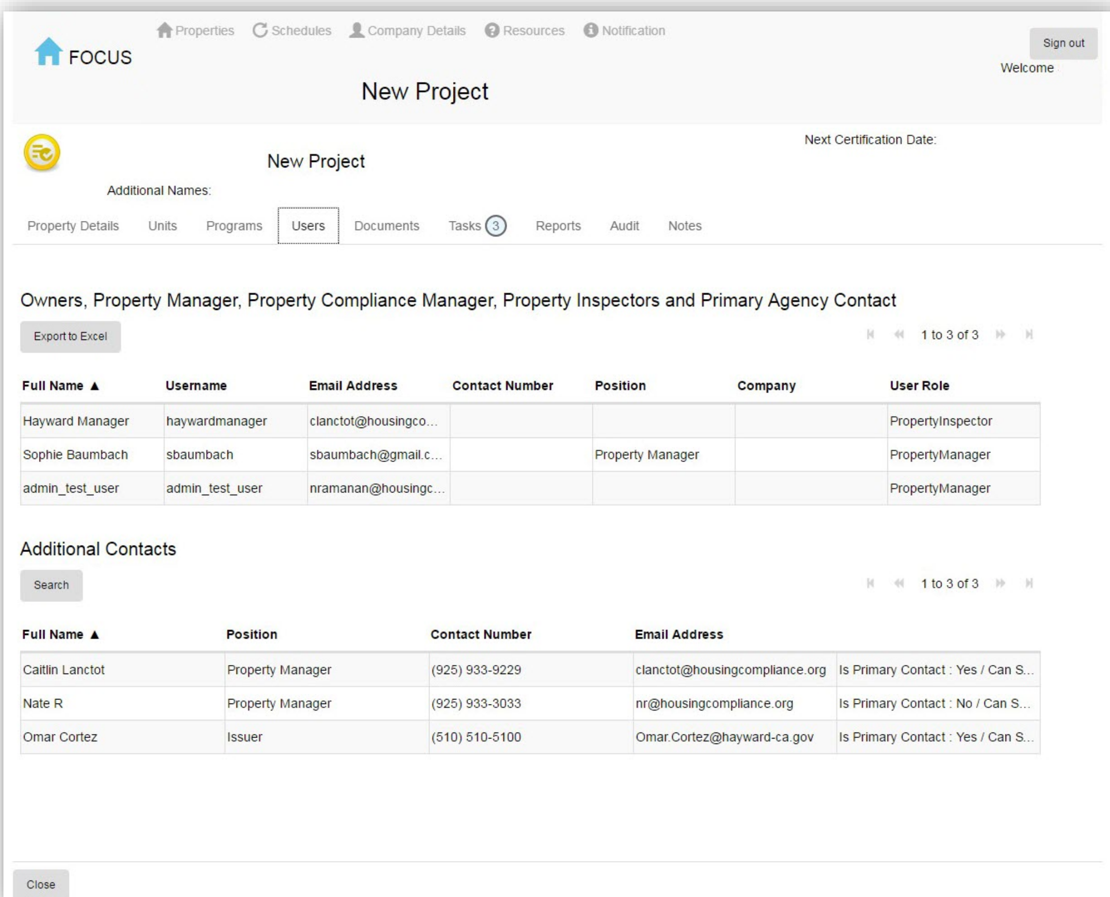
- **Details** – Shows both the program calculation and reporting details.
- **Set-Aside Levels** – Specifies the income and rent limit percentages.
- **Reports –** Provides a historical reference to all reports and lets the Property Manager know if any report is currently open or has been approved by the Compliance Manager.
- **Units –** Matrix of all units and their set-aside level within the program.
- **Tasks** – Identifies if there are any open, closed or scheduled tasks to be accomplished by the Property Manager within the specific regulatory program.
- **Audits –** Notates a history of all inspections on the property assigned to the specific regulatory program.
- **Limits – C**hart of the current and historic income and rent limits within the regulatory program for the county in which the property is located.



Users Tab

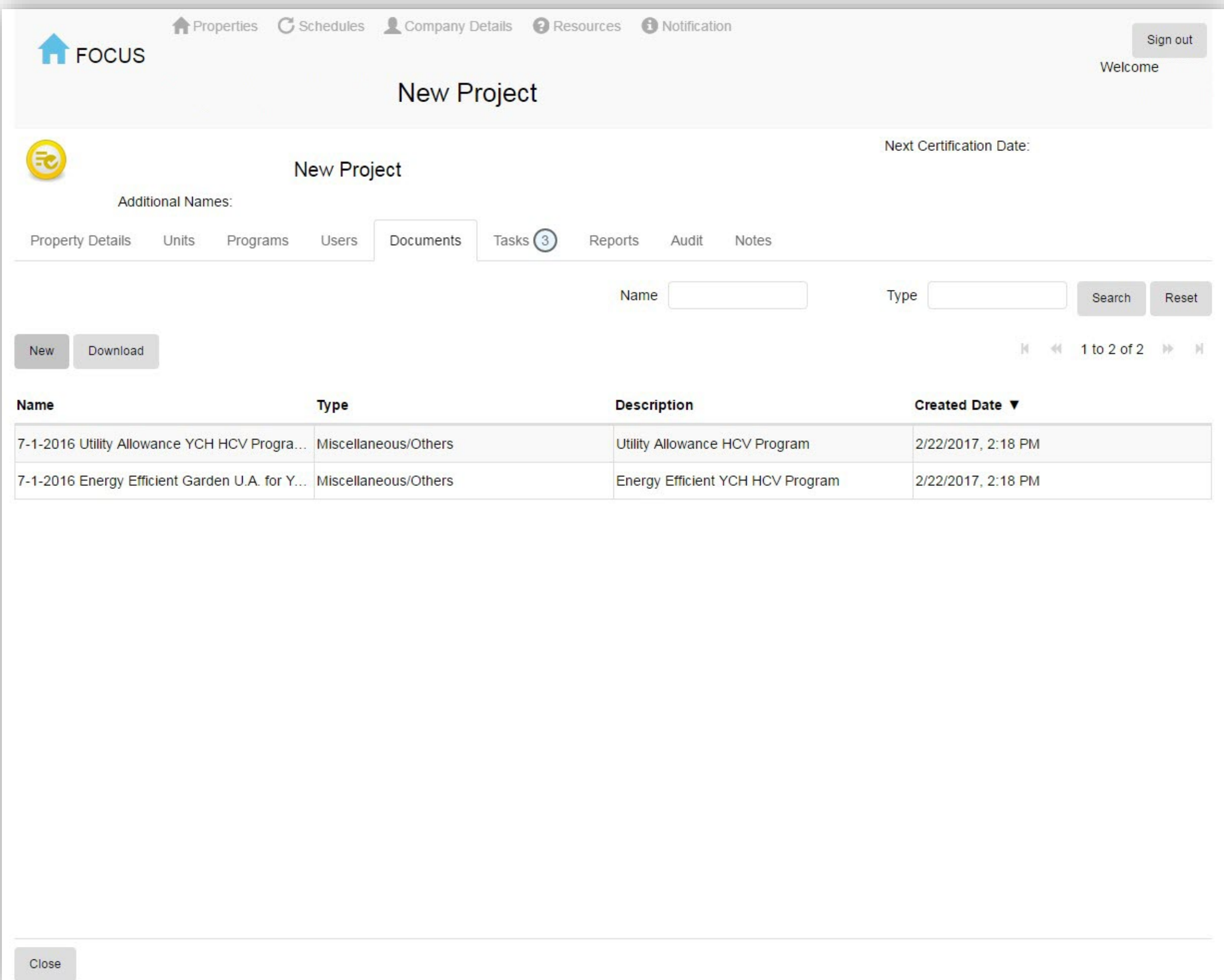
When the **Users** tab is selected, the Property Manager will be able to see all Users with login access to the property. The following information is provided on each User:

- Full Name
- Username
- Email Address
- Contact Number
- Position
- Company
- User Role
  - Owner
  - Property Manager
  - Property Compliance Manager
  - Property Inspectors
  - Primary Agency Contact



Documents Tab

When the Documents tab is selected, the Property Manager is able to see a list of all documents related to the property.

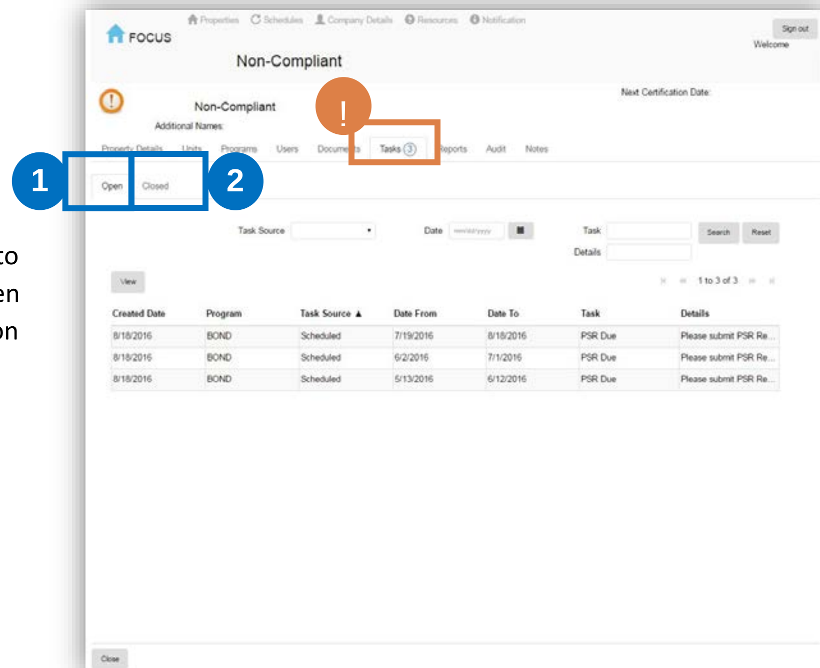


Tasks Tab

The **Tasks** tab enables users to view tasks and contains two sub-tabs **Open** and **Closed**.

❶ The **Open** sub-tab contains tasks that need to be completed by the Property Manager.

❷ The **Closed** sub-tab contains tasks that have been completed by the Property Manager.

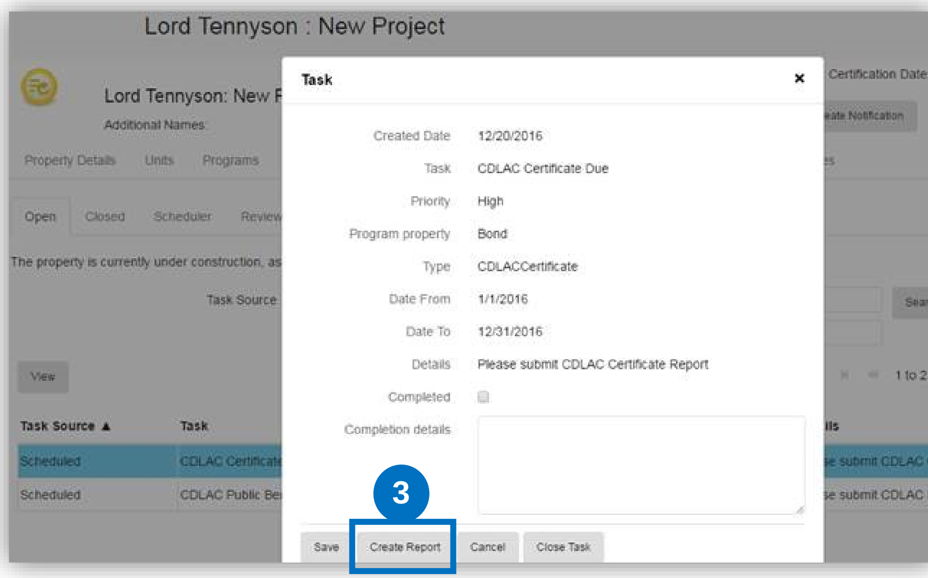


! If you have open tasks for a property, you will see a circled number on the tab next to the word Tasks. This indicates the number of open tasks for the property without the need to click on the Tasks tab.

Within the **Task** tab you will be alerted of any reports that are due, including:

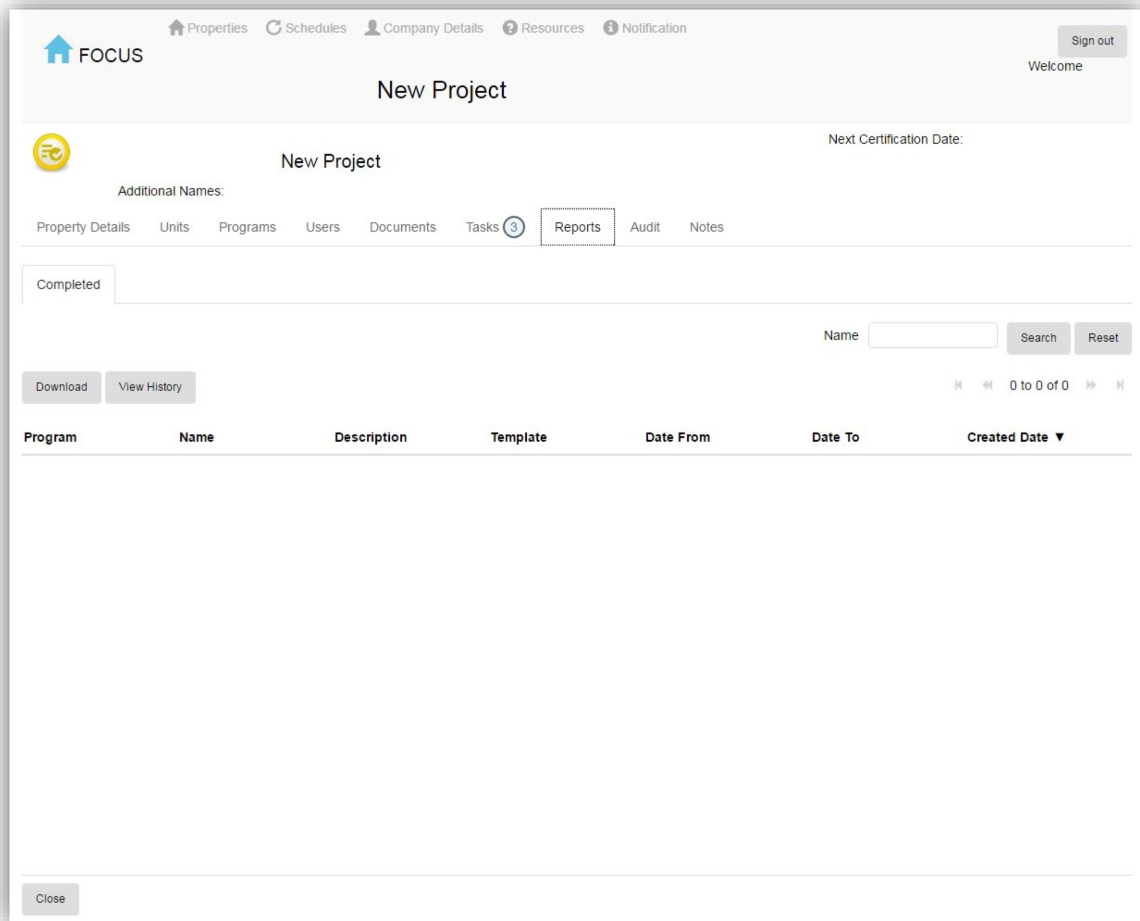
- PSR reports
- CCPC reports
- CDLAC reports (for the Bond Program)

❸ For any Open tasks, double click on the row and a pop-up window will appear. Click on **Create Report**.



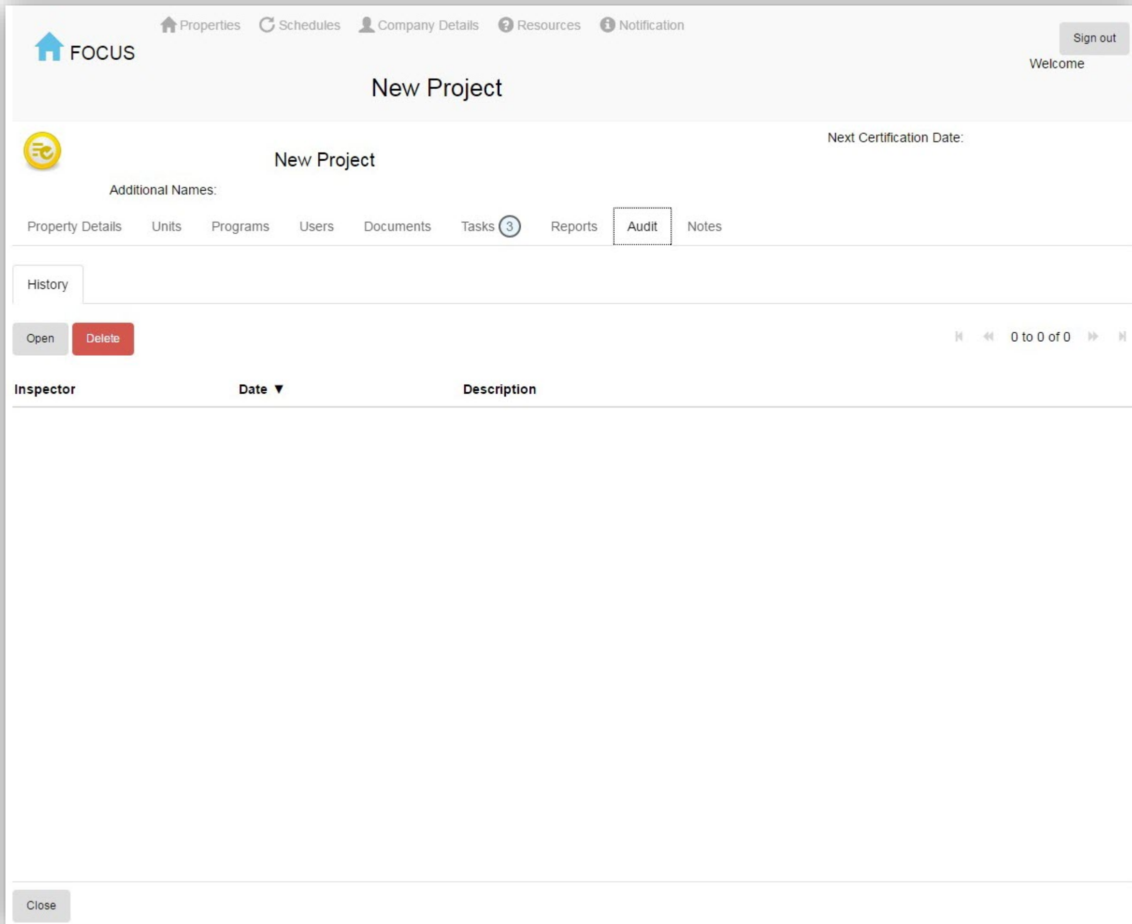
Reports Tab

The **Reports** tab provides a consolidated list of all completed Property Status Reports (PSRs), Certificates of Continuing Program Compliance (CCPCs) and CDLAC Reports for the selected property.



Audits Tab

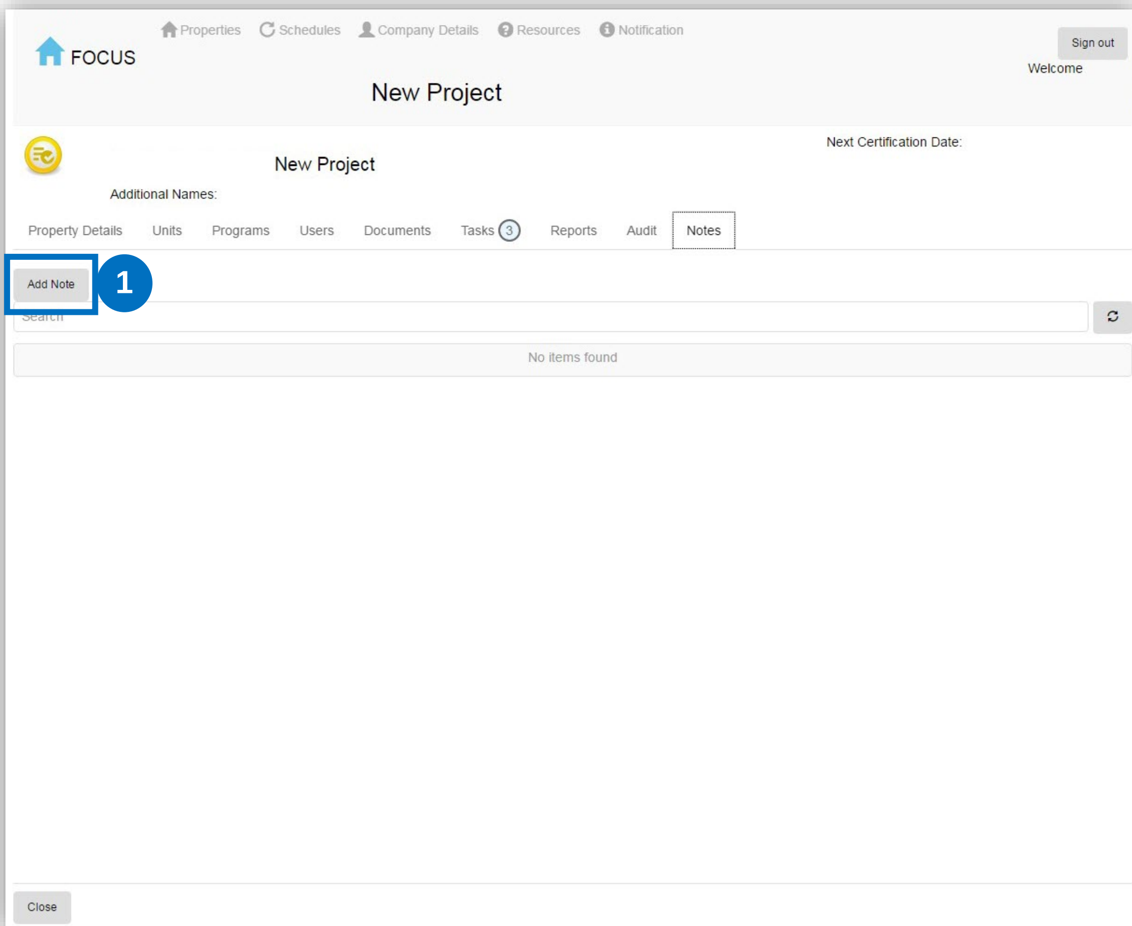
The **Audits** tab provides a consolidated list of any and all audits that have been completed at the property and a list of all open exception items that need to be addressed.



Notes Tab

The function of the **Notes** tab is to provide a place to make and reference information on a property that may not fit into another area of the FOCUS system.

❶ Click the **Add Note** button to input a new note. All users with accesss to the property will be able to see any notes in this tab.



Questions?

If you have any website related questions or concerns, please feel free to reach out to Housing Compliance Services:

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