



FOCUS Software Property Manager User's Guide

June 2017

Housing Compliance Services

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Walnut Creek, CA 94597

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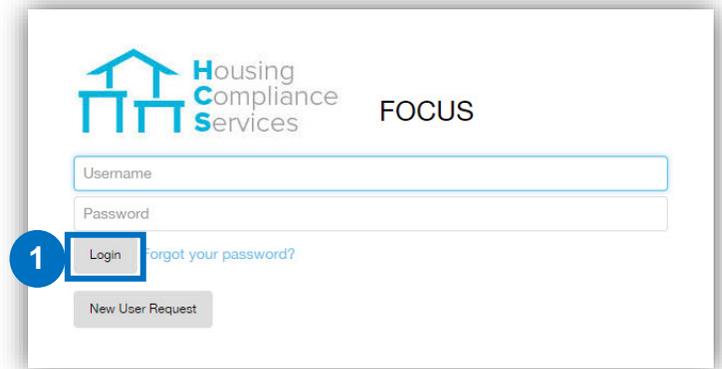
Accessing FOCUS

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

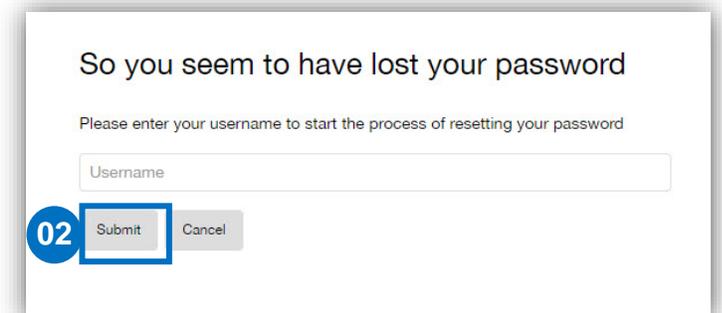
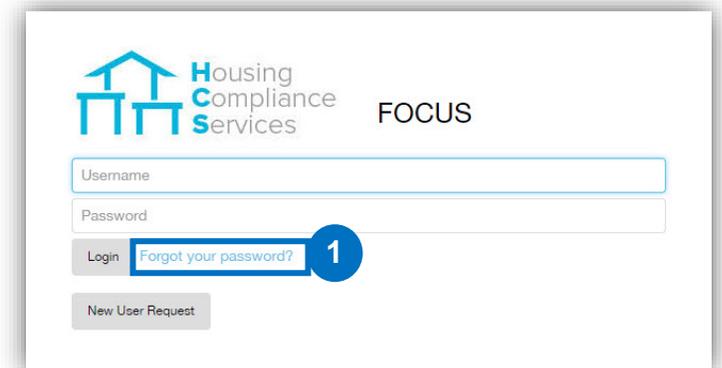
1 Enter the username and password you were provided and then click **LOGIN**.



Lost Password

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

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



FOCUS Homepage

- 1 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.
- 2 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.

The screenshot shows the FOCUS Homepage interface. At the top, there is a navigation bar with links for Properties, Schedules, Company Details, Resources, and Notification. The main header includes the FOCUS logo and the text 'HomePage' with a circled '1' next to it. Below the header is a 'Property Search' section with various input fields: Property Name, Agency (dropdown), Compliance Status (dropdown), Compliance Manager, Property Contact, City, County, Inspector, Application Number, and Company. A 'SEARCH' button is located to the right of the Company field. Below the search fields are tabs for 'All', 'Tax-Exempt Bond Housing Program', 'HOME Program', 'RDA Program', and 'Tasks' (with a circled '3'). A 'VIEW' button is on the left, and pagination '1 to 1 of 1' is on the right. The main content area is a table with columns: Status Tasks, Name, Units, Agency, City, County, PSR, CCPC, and CDLAC. The first row contains 'Bogus Apartments' (with a circled '2' next to the name), 4 units, City of Hayward, Hayward, and Alameda County. Below the table are three legends: 'Property Status Legend' with counts (Total: 1, Compliant: 0, Material Non Compliant: 0, Under Construction: 0, New Project: 1, Non Compliant: 0, Closed: 0), 'Report Status Legend' (Submitted, Due, Completed, Return For Revision), and 'Task Status Legend' (Open Tasks, Draft Changes, Submitted Changes).

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

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

FOCUS Non-Compliant

Next Certification Date:

Additional Names:

1

Property Details Units Programs Users Documents Tasks (3) Reports Audit Notes

Units Buildings

Total Units: 15 (7 declared)
Exempt Units: 1 (0 declared)
Market Rate Units: 0 (0 declared)

Unit number Bed rooms Size (sq Footage) Search Reset Edit

1 to 7 of 7

Unit	Building	Bed rooms	Event Type	Date	HouseHold Size	Current Income	Rent	Move in date	Move in Income	Move in household
1		0	Rental Update	1/1/2016	1	\$ 100000.00	\$ 2000.00	1/1/2008	\$ 100000.00	1
2		0	Rental Update	5/9/2016	3	\$ 150000.00	\$ 1000.00	7/1/2009	\$ 95000.00	2
3		0	Rental Update	6/1/2016	4	\$ 97000.00	\$ 1400.00	10/10/2010	\$ 72000.00	3
4		1	Rental Update	2/16/2016	4	\$ 20000.00	\$ 700.00	2/16/2014	\$ 68000.00	4
5		1	Rental Update	3/1/2015	5	\$ 200000.00	\$ 2000.00	3/1/2005	\$ 74590.00	5
6		2	Move In	9/6/2016	3	\$ 6200.00	\$ 300.00	9/6/2016	\$ 6200.00	3
10		3	Rental Update	5/10/2016	4	\$ 32000.00	\$ 2000.00	1/1/2016	\$ 98000.00	5

Close

Property Details Tab

1 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

The screenshot shows the FOCUS Property Manager interface. At the top, there is a navigation bar with icons for Properties, Schedules, Company Details, Resources, and Notification. The user is logged in as 'Welcome' and has a 'Sign out' button. The main heading is 'Non-Compliant'. Below this, there is a warning icon and the text 'Non-Compliant' with a 'Next Certification Date:' field. A tabbed interface is shown with 'Property Details' selected and highlighted by a blue box and a blue circle with the number '1'. Other tabs include 'Units', 'Programs', 'Users', 'Documents', 'Tasks' (with a '3' notification), 'Reports', 'Audit', and 'Notes'. The 'Property Details' tab displays a table of information:

Agency	Disneyland	Status	Active	
Zip code	94542	Last site visit	4/25/2016	Draft changes
Street	1 Majestic Way	In Service date	4/2/2008	
City	Hayward			
County	Alameda County			
State	California			
Property Type	Senior			
Development Type				
Total Units	15			
Application Number				

At the bottom left of the interface, there is a 'Close' button.

Units Tab

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

- Units
- Buildings

1 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.

The screenshot shows the 'Non-Compliant' section of the FOCUS software. It includes a navigation bar with 'Units' selected, a search bar, and a table of unit information. A blue circle with the number '1' highlights the table header.

Unit	Building	Bed rooms	Event Type	Date	Household Size	Current Income	Rent	Move in date	Move in Income	Move in household
1		0	Rental Update	1/1/2016	1	\$ 100000.00	\$ 2000.00	1/1/2008	\$ 100000.00	1
2		0	Rental Update	5/9/2016	3	\$ 150000.00	\$ 1000.00	7/1/2009	\$ 95000.00	2
3		0	Rental Update	6/1/2016	4	\$ 97000.00	\$ 1400.00	10/10/2010	\$ 72000.00	3
4		1	Rental Update	2/16/2016	4	\$ 20000.00	\$ 700.00	2/16/2014	\$ 68000.00	4
5		1	Rental Update	3/1/2015	5	\$ 200000.00	\$ 2000.00	3/1/2005	\$ 74590.00	5
6		2	Move In	9/6/2016	3	\$ 6200.00	\$ 300.00	9/6/2016	\$ 6200.00	3
10		3	Rental Update	5/10/2016	4	\$ 32000.00	\$ 2000.00	1/1/2016	\$ 98000.00	5

Editing Units

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

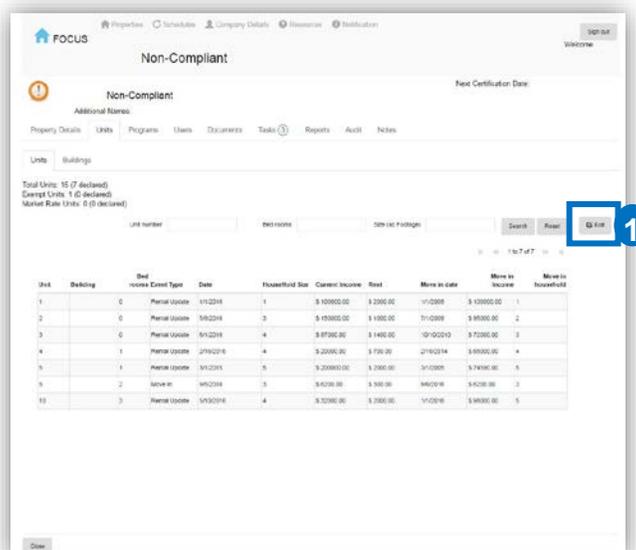
- **Move In**
- **Move Out**
- **Rental Update**
 - Rent change
 - Income change
 - Household size adjustment
 - Recertification

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.

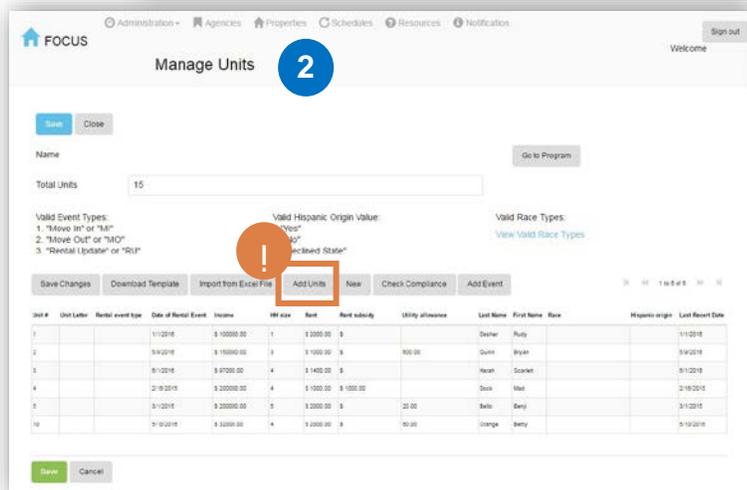
1 To begin editing unit records, click the **Edit** button on the Units tab.

2 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.



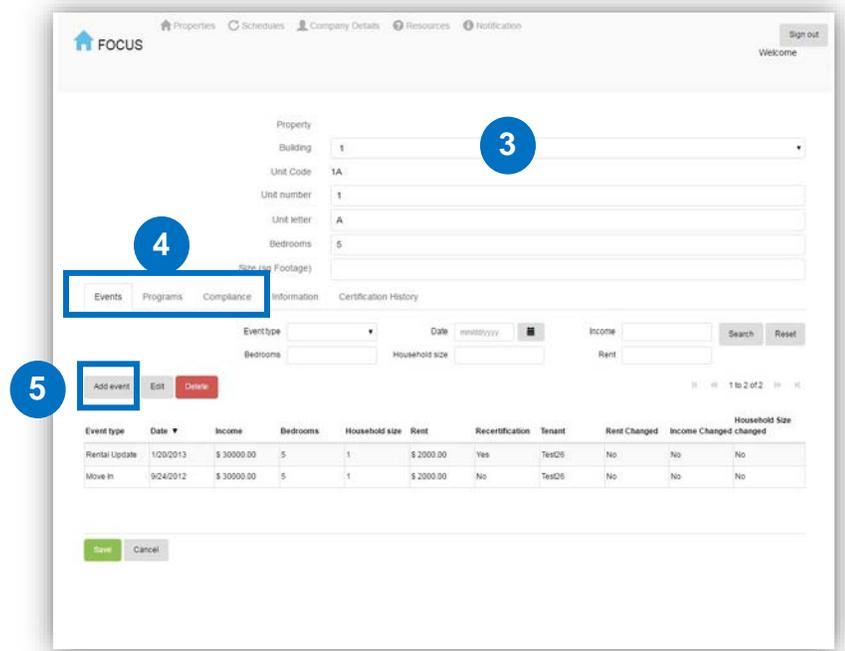
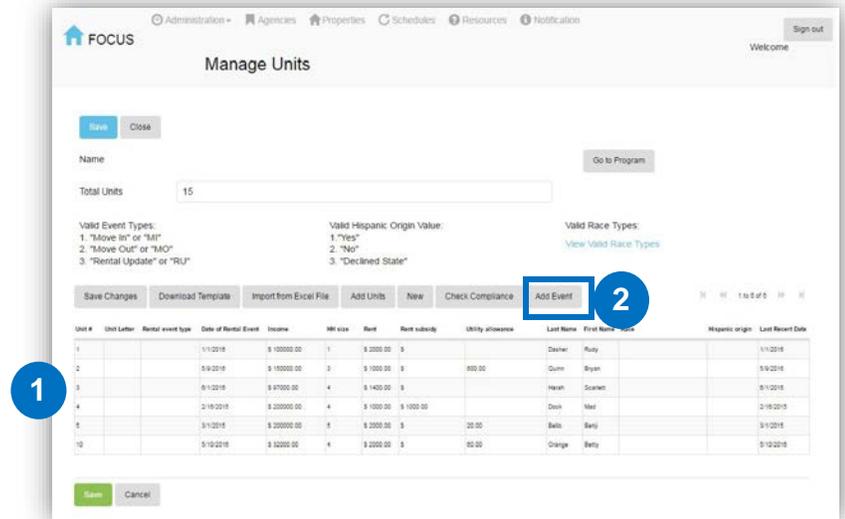
! The **Add Units** button will enable Property Managers or the Compliance Administrator to import multiple units in a batch. This is a one-time event to create the units listed within the property.



Editing Units – Adding Events

To begin adding a new event to a unit:

- 1 Click on the unit to be edited
- 2 Click the **Add Event** button.
- 3 A new window will open to the **Unit Summary** page with event information and to edit the event.
- 4 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
- 5 To update a unit, click the **Add Event** button. A new screen will open.



4 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.

The screenshot shows the 'Edit Event' form in the FOCUS Software Property Manager. The form is titled 'Edit Event' and has a 'Sign out' button in the top right corner. The form is divided into several sections: 'Event Type' (set to 'Rental Update'), 'Recertification' (checked), 'Date' (empty), 'Move out Reason' (empty), 'Income (\$)' (30000.00), 'Rent (\$)' (2000.00), 'Bedrooms' (5), 'Household Size' (1), 'Utility Allowance' (0.00), 'Rent Subsidy' (60.00), 'Tenant Name' (Test25), 'Race' (Declined State), 'Hispanic Origin' (No), and 'Veteran Status' (empty). There are several error messages: '* Date is required', '* Household size is required', and '* Tenant name is required'. A blue circle with the number 4 highlights the 'Event Type' dropdown menu. A red circle with an exclamation mark highlights the 'Recertification' checkbox, with a blue circle and the number 5 next to it. A blue circle with the number 5 highlights the 'Save' button at the bottom of the form.

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

5 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:

1 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.

2 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

Unit #	Unit Letter	Building	Rental event type	Date of Rental Event	Income	HH size	Rent	Rent subsidy	Utility allowance	Tenant	Race	Hispanic origin	Last Recert Date
1		1	Move In	5/1/2016	\$ 11111.00	1	\$ 100.00	\$ 100.00	100.00	MARIN DEVI	Declined State	Declined State	6/1/2016
1	A	1	Rental Update	1/20/2013	\$ 30000.00	1	\$ 2000.00	\$ 60.00	0.00	TEXOH	Declined State	No	1/20/2013
2		1	Move In	3/3/2014	\$ 7000.00	2	\$ 500.00	\$ 0.00	50.00	HOLDEN	Declined State	Declined State	3/3/2014
3		1	Rental Update	1/1/2010	\$ 13450.00	2	\$ 2000.00	\$ 0.00	0.00	SEAN	Declined State	Declined State	1/1/2010
4		1	Rental Update	7/7/2015	\$ 100000.00	1	\$ 500.00	\$ 0.00	0.00	MENDY	Declined State	Declined State	7/7/2015

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:

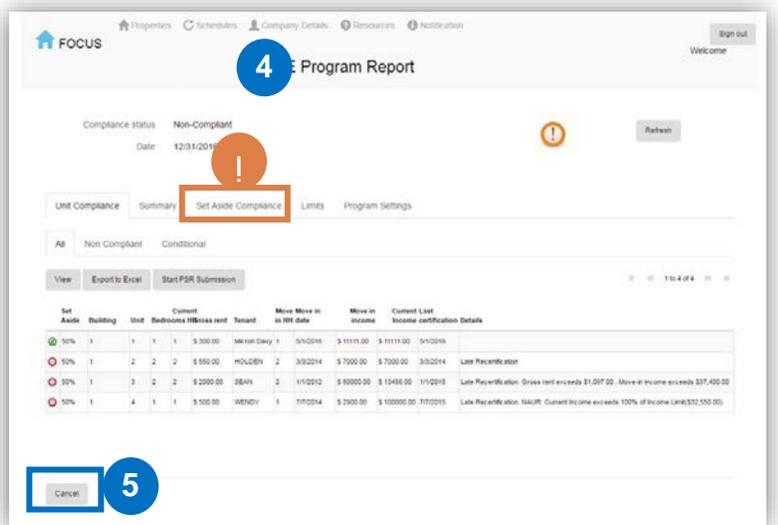
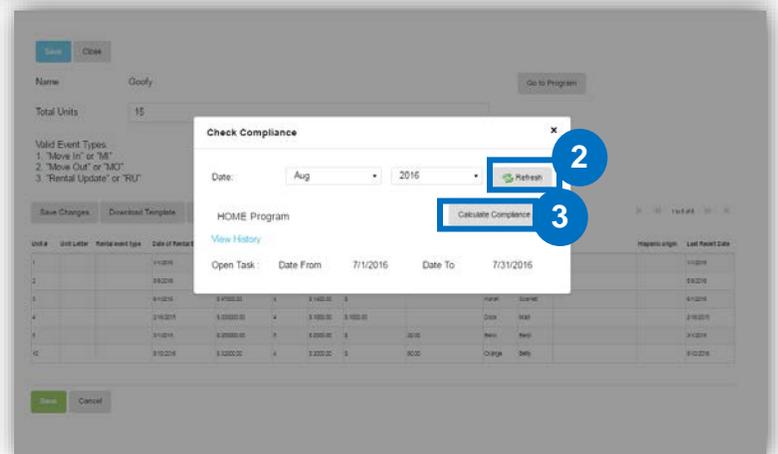
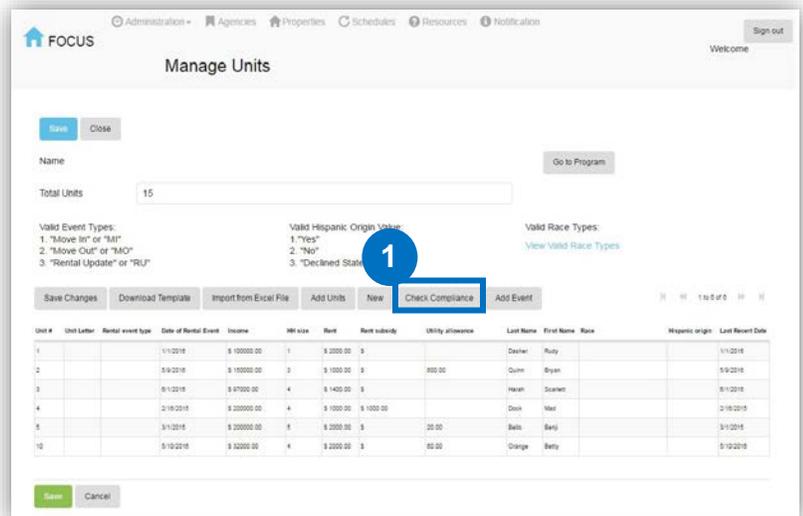
- Select the initial property in which the PSR report will be created.
- Click on the **Units** tab and click the edit button.

Checking Compliance

- 1 Once in the Manage Units screen, click the **Check Compliance** button
- 2 A pop-up window will ask the due date for the report. Enter the information and click **Refresh**.
- 3 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.
- 4 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.
- 5 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

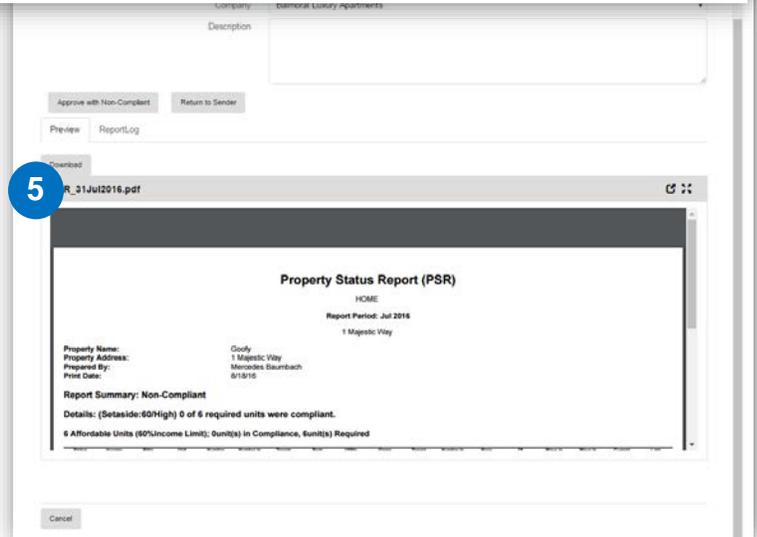
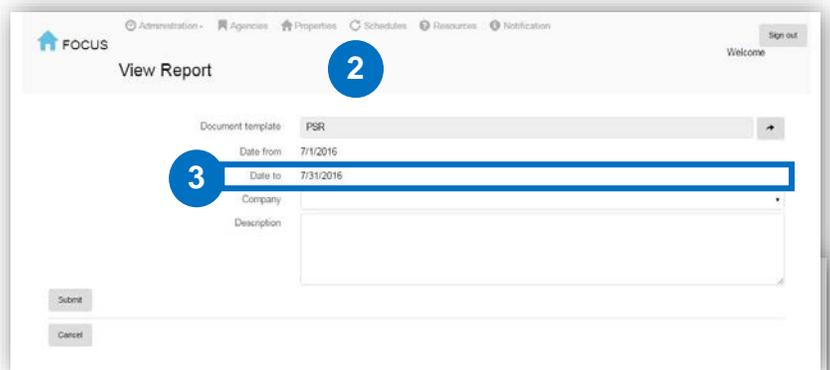
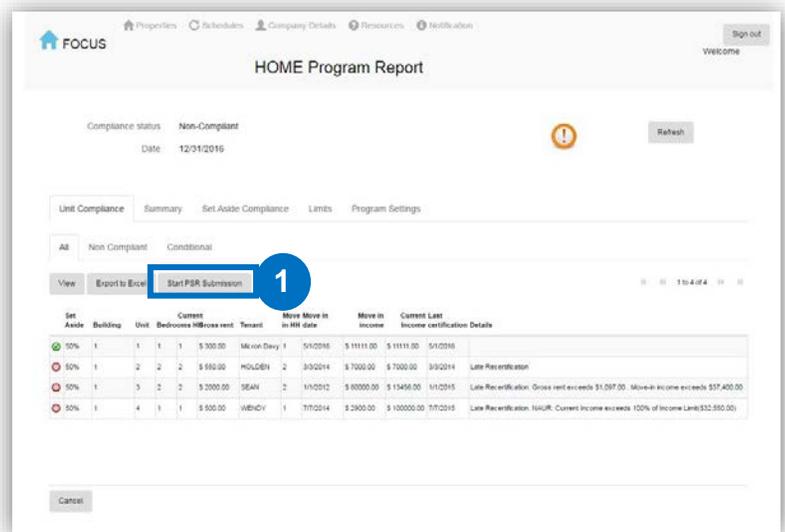


Click the **Set-Aside Compliance** tab to receive a summary of the number of units that are in compliance and how many are required for each set aside.



Creating a Project Status Report (PSR)

- 1 After you have reviewed the Compliance Report, from the Program Report screen, click the **Start PSR Submission** button.
- 2 You will be taken to the View Report screen.
- 3 Confirm the date range for the report you are running and choose your company from the dropdown menu.
- 4 Click **Submit**.
- 5 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.”

1 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** – Chart of the current and historic income and rent limits within the regulatory program for the county in which the property is located.

The screenshot displays the FOCUS software interface. At the top, there is a navigation bar with icons for Administration, Agencies, Properties, Schedules, Resources, and Notification, along with a 'Sign out' button. The main header reads 'Non-Compliant' and 'Welcome'. Below this, there are three program entries, each with a 'Manage Programs' button and an 'Open Program' button. A red circle with the number '1' highlights the 'Open Program' button for the first program, 'BOND: Non-Compliant'. The 'BOND: Non-Compliant' program details include: 5 Restricted Units, Compliance Status Date of 7/1/2016, a draft report status, and an effective limit of 50% for Alameda County. The 'HOME: Non-Compliant' program details include: 6 Restricted Units, Compliance Status Date of 5/13/2016, Last Report Date of 5/13/2016, a draft report status, and an effective limit of 30% for Alameda County. The 'Inclusionary: No Current Compliance Report' program details include: 0 Restricted Units. Each program entry also has an 'Open Tasks' section with 'Review PSR report' tasks. A 'Close' button is located at the bottom left of the interface.

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

The screenshot shows the FOCUS software interface for a 'New Project'. The top navigation bar includes 'Properties', 'Schedules', 'Company Details', 'Resources', and 'Notification'. The 'Users' tab is selected in the 'Additional Names' section. Below this, there are two tables of user information.

Owners, Property Manager, Property Compliance Manager, Property Inspectors and Primary Agency Contact

Full Name ▲	Username	Email Address	Contact Number	Position	Company	User Role
Hayward Manager	haywardmanager	clanctot@housingco...				PropertyInspector
Sophie Baumbach	sbaumbach	sbaumbach@gmail.c...		Property Manager		PropertyManager
admin_test_user	admin_test_user	nramanan@housingc...				PropertyManager

Additional Contacts

Full Name ▲	Position	Contact Number	Email Address	Is Primary Contact : Yes / Can S...
Caitlin Lancot	Property Manager	(925) 933-9229	clanctot@housingcompliance.org	Is Primary Contact : Yes / Can S...
Nate R	Property Manager	(925) 933-3033	nr@housingcompliance.org	Is Primary Contact : No / Can S...
Omar Cortez	Issuer	(510) 510-5100	Omar.Cortez@hayward-ca.gov	Is Primary Contact : Yes / Can S...

Documents Tab

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

The screenshot displays the FOCUS software interface for a 'New Project'. The top navigation bar includes 'Properties', 'Schedules', 'Company Details', 'Resources', and 'Notification'. The main header shows 'New Project' and 'Next Certification Date:'. Below this, there are tabs for 'Property Details', 'Units', 'Programs', 'Users', 'Documents', 'Tasks' (with a notification of 3), 'Reports', 'Audit', and 'Notes'. The 'Documents' tab is active, showing a search area with 'Name' and 'Type' input fields, and 'Search' and 'Reset' buttons. Below the search area are 'New' and 'Download' buttons, and a pagination indicator '1 to 2 of 2'. The main content area contains a table with the following data:

Name	Type	Description	Created Date ▼
7-1-2016 Utility Allowance YCH HCV Progra...	Miscellaneous/Others	Utility Allowance HCV Program	2/22/2017, 2:18 PM
7-1-2016 Energy Efficient Garden U.A. for Y...	Miscellaneous/Others	Energy Efficient YCH HCV Program	2/22/2017, 2:18 PM

A 'Close' button is located at the bottom left of the interface.

Tasks Tab

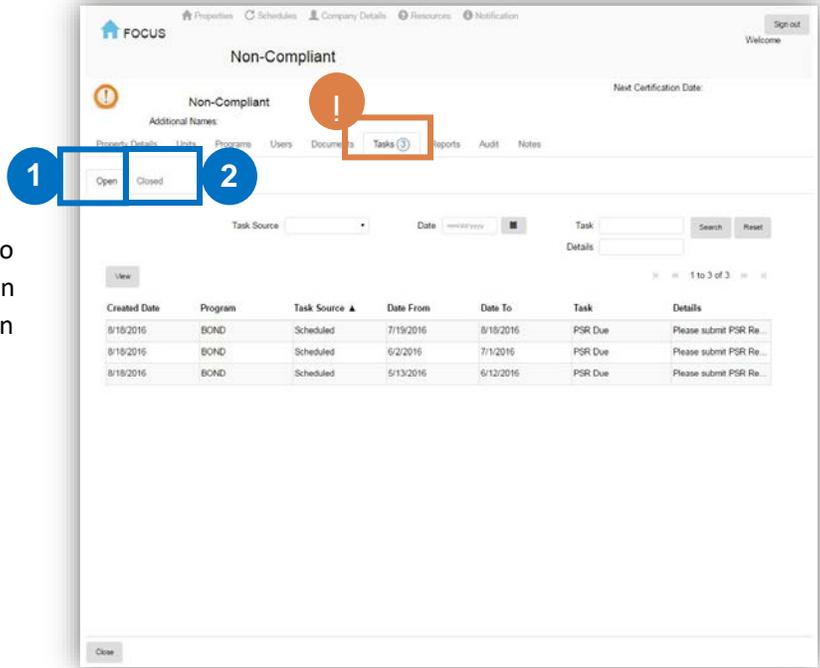
The **Tasks** tab enables users to view tasks and contains two sub-tabs **Open** and **Closed**.

- 1 The **Open** sub-tab contains tasks that need to be completed by the Property Manager.
- 2 The **Closed** sub-tab contains tasks that have been completed by the Property Manager.

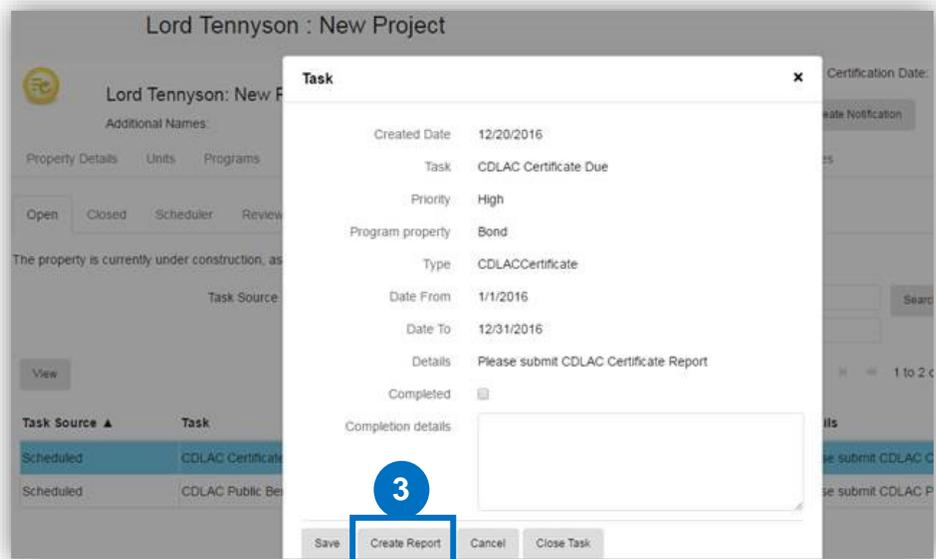
! If you have open tasks for a property, you will see a circled number on the tab next to the word **Tasks**. This indicates the number of open tasks for the property without the need to click on the **Tasks** tab.

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)

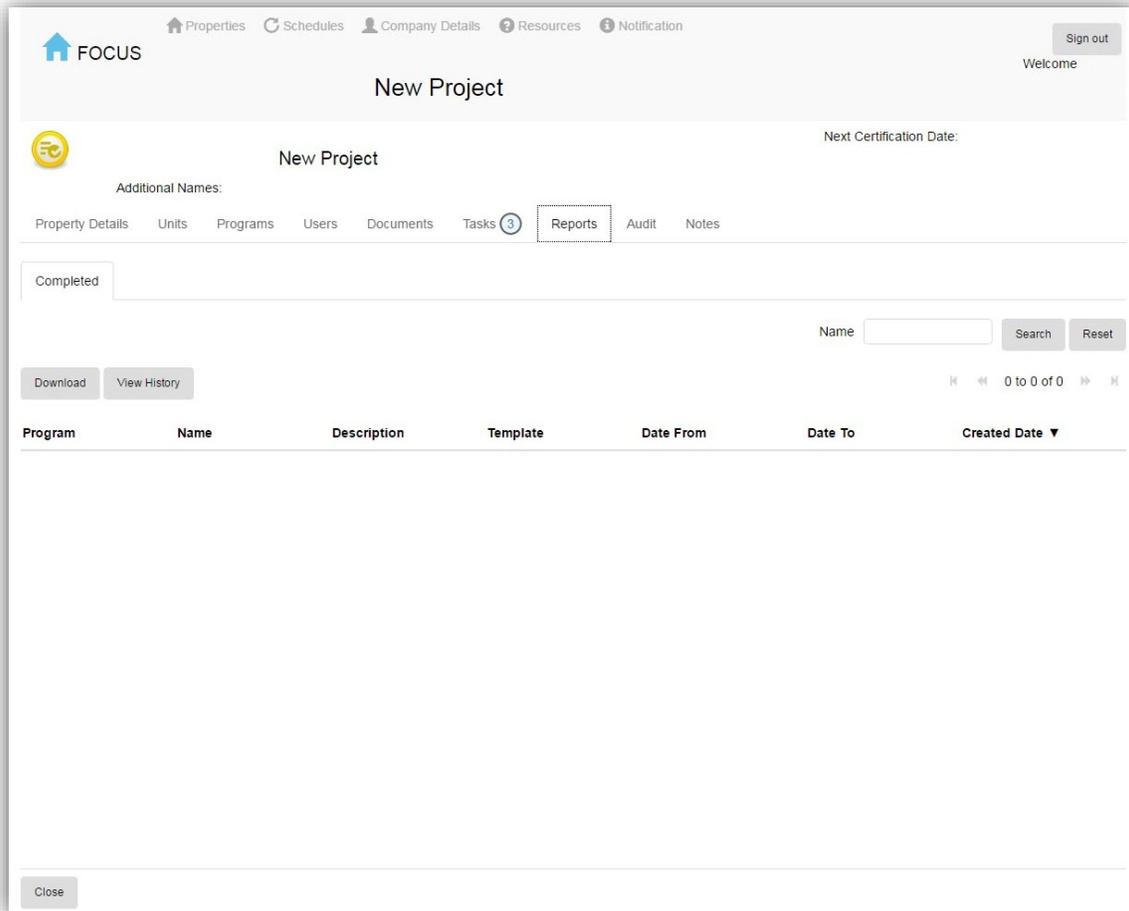


- 3 For any Open tasks, double click on the row and a pop-up window will appear. Click on **Create Report**.



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

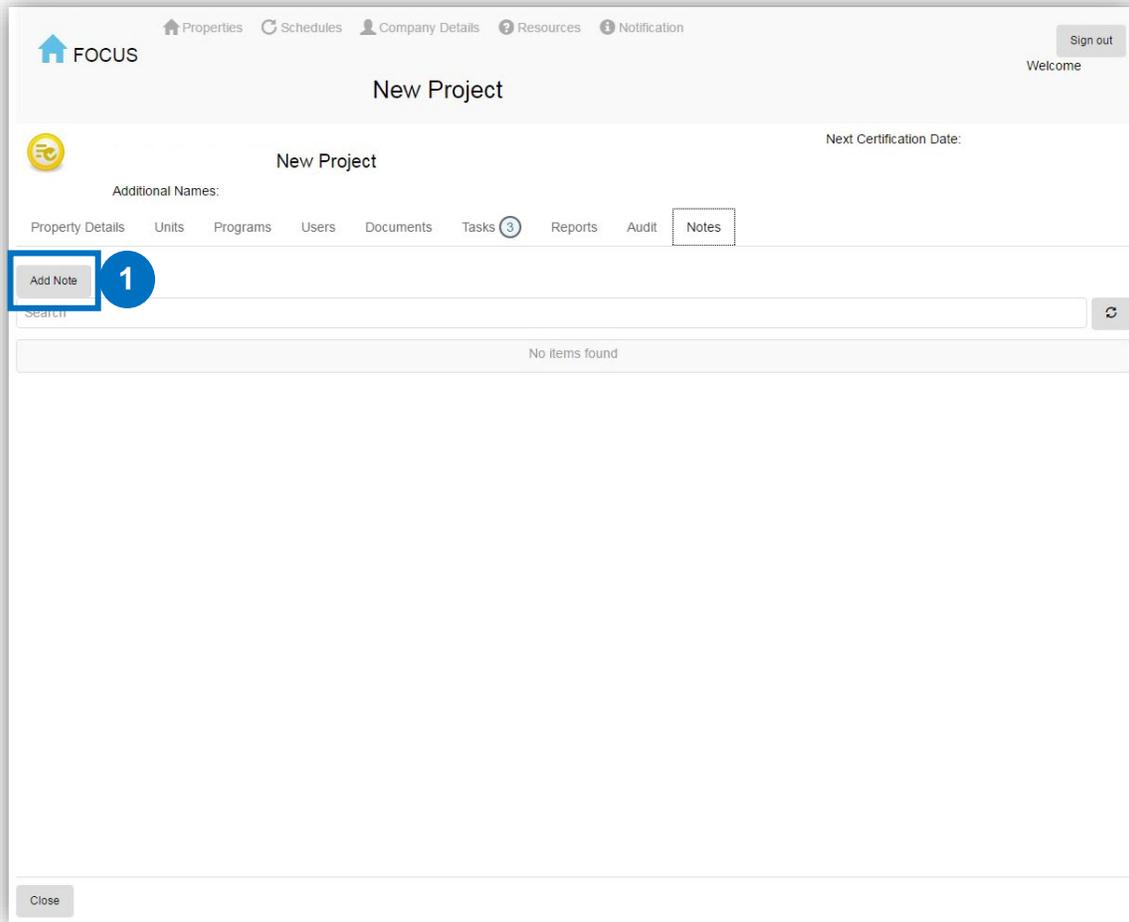
The **Audits** tab provides a consolidated list of any and all audits that have been completed at the property and a list of all open exception items that need to be addressed.

The screenshot displays the FOCUS software interface for a 'New Project'. At the top, there is a navigation bar with icons for Properties, Schedules, Company Details, Resources, and Notification, along with a 'Sign out' button and a 'Welcome' message. Below this, the main header area shows 'New Project' and 'Next Certification Date:'. A sub-header area includes a yellow circular icon and the text 'Additional Names:'. A horizontal menu below the sub-header contains tabs for Property Details, Units, Programs, Users, Documents, Tasks (with a notification badge of 3), Reports, Audit (which is highlighted with a red border), and Notes. Under the 'History' tab, there are 'Open' and 'Delete' buttons. A pagination indicator shows '0 to 0 of 0'. Below this is a table with columns for 'Inspector', 'Date', and 'Description'. The table is currently empty. A 'Close' button is located at the bottom left of the interface.

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.

- 1 Click the **Add Note** button to input a new note. All users with access 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:

Caitlin Lanctot

clanctot@housingcompliance.org

(925) 280-4394

Mercedes Baumbach

mbaumbach@housingcomplaince.org

(925) 478-5855