FOCUS Software Property Manager User's Guide

April 2025

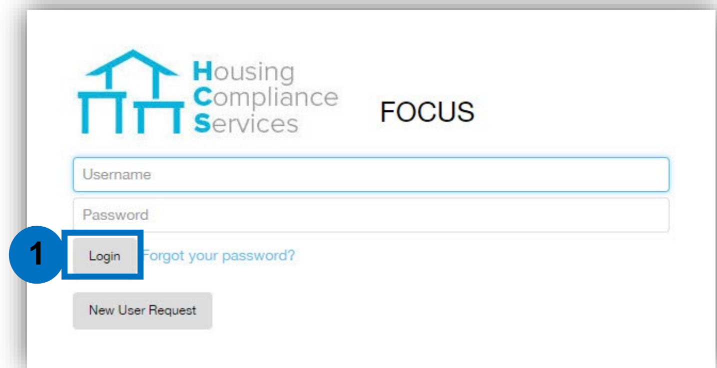
Accessing FOCUS

Login to FOCUS

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

Go to focus.housingcompliance.org

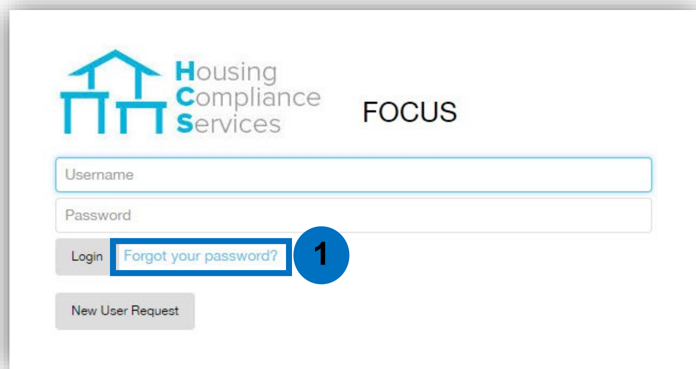
❶ Enter the username and password you were provided and then click **LOGIN**.

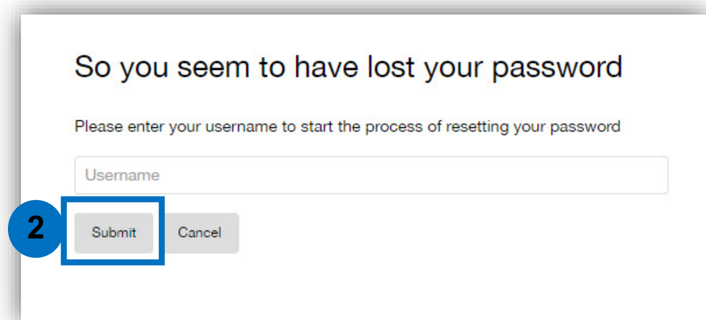


Lost Password

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

❷ You will be prompted to enter your username (firstlastname). Click **Submit**. The website will email you a like to reset your password.





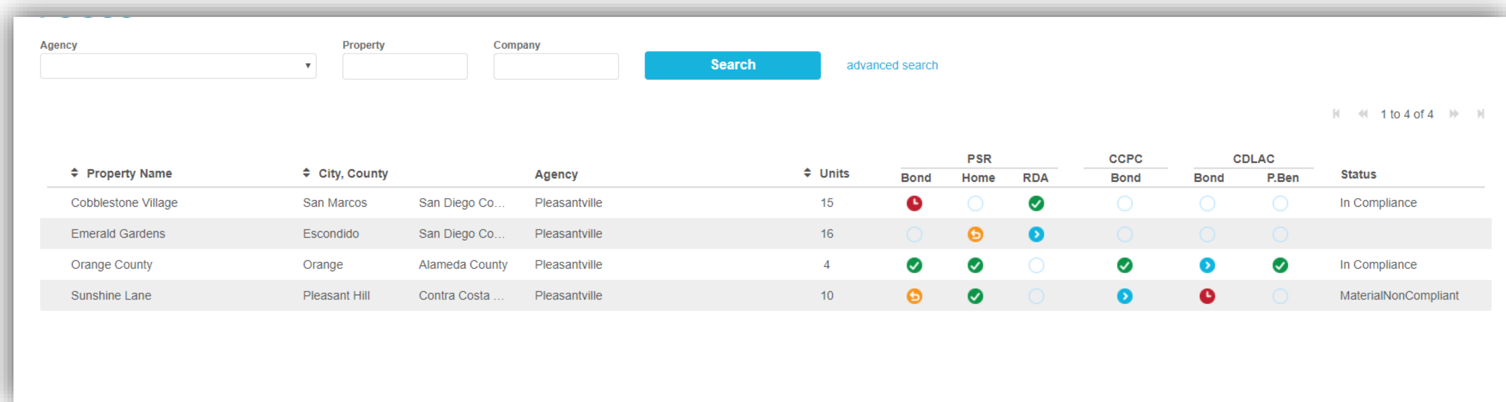
FOCUS Homepage

❶ After logging in, you will be sent to the FOCUS Homepage. This page is the management dashboard for the housing portfolio that provides a summary of the portfolio and is the starting point for accessing the property information.

❷ All the properties assigned to your username will be displayed on the homepage. Some properties may be listed twice and that is because each property is monitored by a different Agency.

❸ To choose a specific property, double-click on the property row as shown in the image below. Once you double-click the specific property you will then be redirected to the ***Property Details*** page.

Report Icon Legend:


Agency
Property
Company
Search
advanced search
1 to 4 of 4

Property Name	City, County		Agency	Units	PSR Bond	PSR Home	PSR RDA	CCPC Bond	CDLAC Bond	CDLAC P.Ben	Status
Cobblestone Village	San Marcos	San Diego Co...	Pleasantville	15							In Compliance
Emerald Gardens	Escondido	San Diego Co...	Pleasantville	16							
Orange County	Orange	Alameda County	Pleasantville	4							In Compliance
Sunshine Lane	Pleasant Hill	Contra Costa ...	Pleasantville	10							MaterialNonCompliant

Accepted

Submitted

Returned

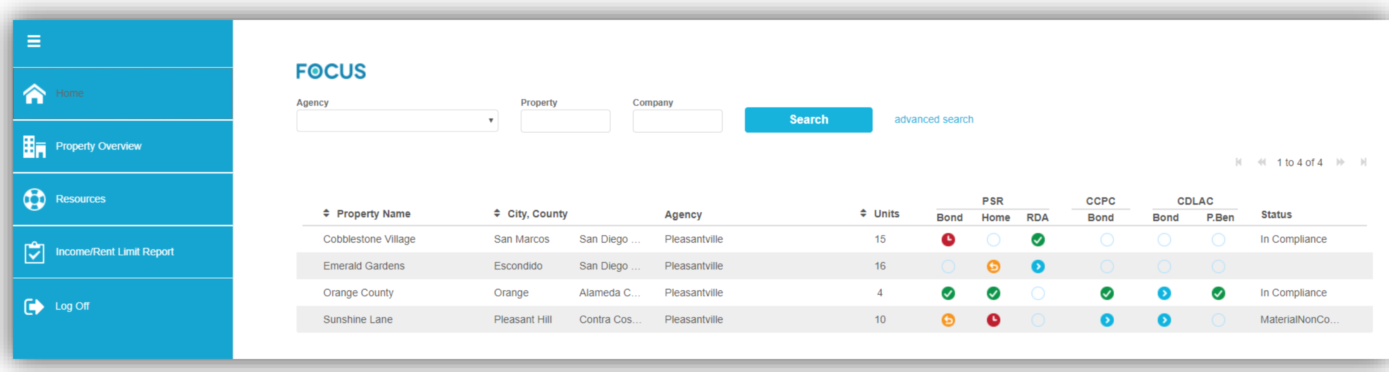
Due/Overdue

Left Hand Tool Bar

On the left hand tool bar you will see 5 options

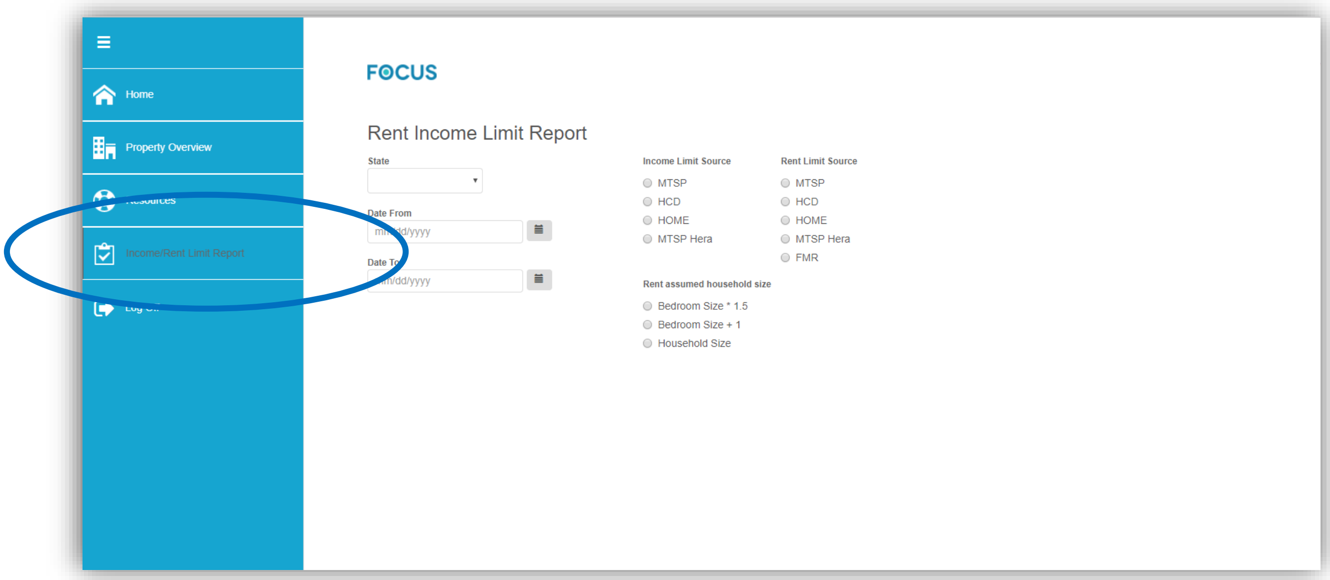
The options are as follows:

- Home Page
- Property Overview – will inform the status of all properties, property type and total units
- Resources – additional items that can be added by the Agency
- Income/Rent Limit Report – Ability to create a specific income and rent limit report (see below)
- Logout



<u>Income/Rent Limit Report</u>

- Users can pull the rent and income limits for a specific program during a defined time period. Select all fields in order to Generate Report (State, County, Date Range, Income Source, Rent Limit Source, Rent Calculation/Assumed houshold size, and the set-asides).



Property Details

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

The different tabs are as follows:

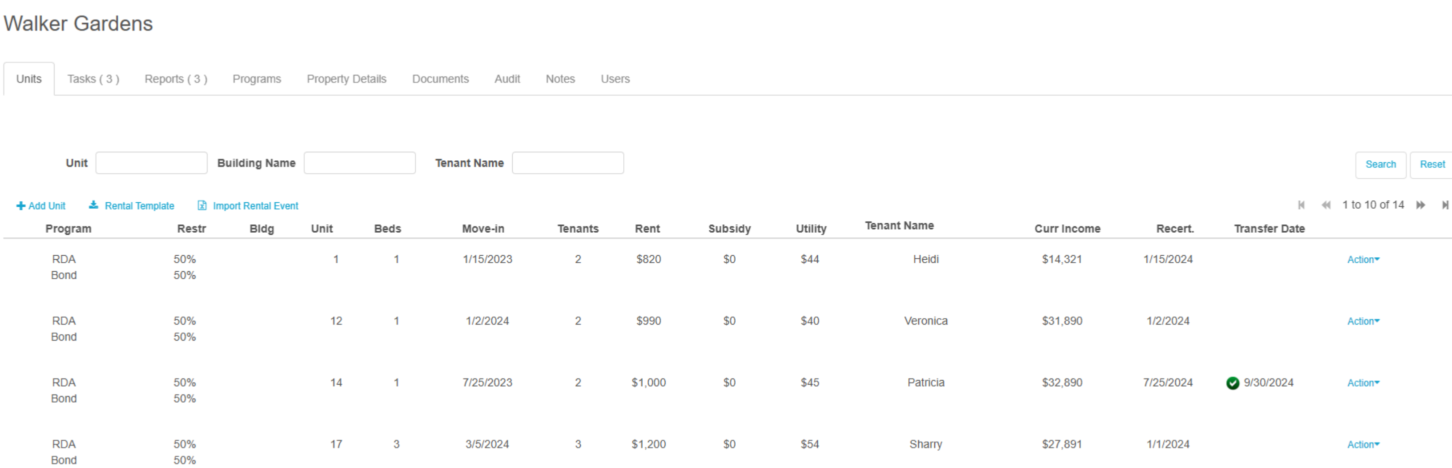
- Units
- Tasks
- Reports
- Programs
- Property Details
- Documents
- Audit
- Notes
- Users

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

Units Tab

Within the Units tab, you will see the following property information:

- **Program** – The specific program(s) being monitored (Bond, HOME, and/or RDA)
- **Restr** – “Restriction”, the set aside percentage(s) specific to the unit for each program
- **Bldg** – Building letter or number
- **Unit** – Unit number/Letter
- **Beds** – The number of bedrooms within the unit
- **Move-in** – The household’s initial move-in date
- **Tenants** – The current number of people/tenants in the household
- **Rent** – The tenant paid portion of rent paid on a monthly basis
- **Subsidy** – The amount of subsidy provided on a monthly basis (if applicable)
- **Utility** – The amount of monthly utility allowance (if applicable)
- **Tenant Name** – The name of the head of household in the unit
- **Current Income** – The current annual income of the household
- **Recert.** – The last date the unit was recertified
- **Transfer Date**—Indicates the date the tenant transferred in or out of the unit in the last Event. plus a date means the tenant transferred into a unit. A vacant unit with a Transfer Date indicates the previous household transferred out of the unit.



Walker Gardens

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

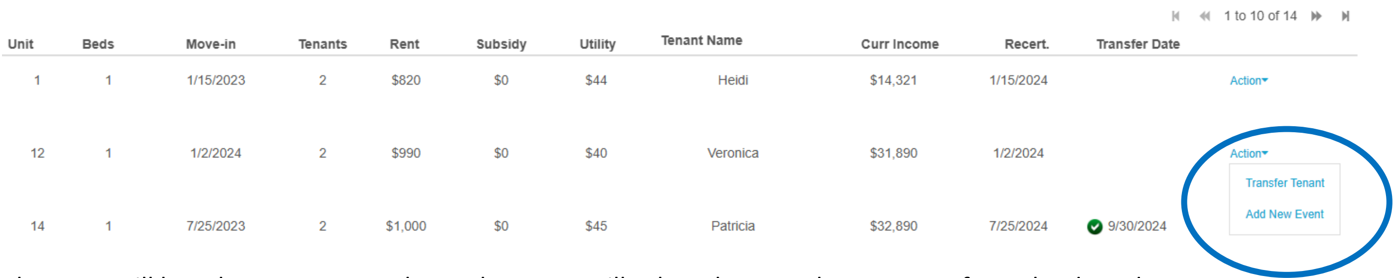
Unit | Building Name | Tenant Name | Search | Reset

+ Add Unit | Rental Template | Import Rental Event | 1 to 10 of 14

Program	Restr	Bldg	Unit	Beds	Move-in	Tenants	Rent	Subsidy	Utility	Tenant Name	Curr Income	Recert.	Transfer Date	
RDA Bond	50% 50%		1	1	1/15/2023	2	$820	$0	$44	Heidi	$14,321	1/15/2024		Action
RDA Bond	50% 50%		12	1	1/2/2024	2	$990	$0	$40	Veronica	$31,890	1/2/2024		Action
RDA Bond	50% 50%		14	1	7/25/2023	2	$1,000	$0	$45	Patricia	$32,890	7/25/2024	9/30/2024	Action
RDA Bond	50% 50%		17	3	3/5/2024	3	$1,200	$0	$54	Sharry	$27,891	1/1/2024		Action

Updating Units

In order to update a unit, click the blue Action button to the right-hand side of the screen and select “Add New Event”.

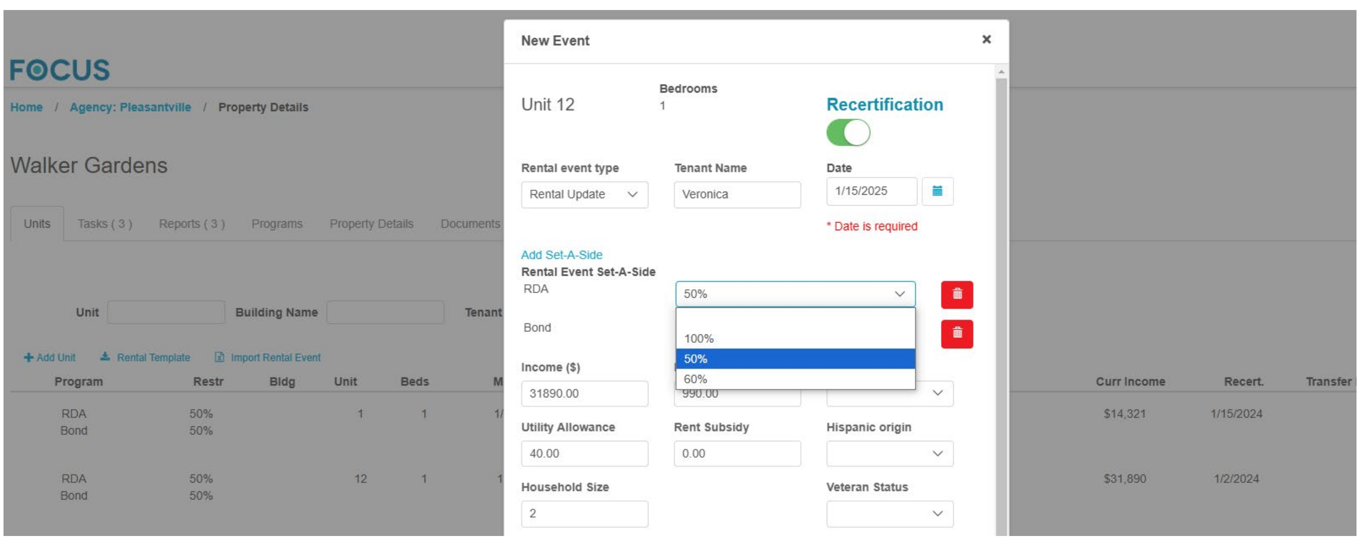


Then you will be taken to a pop-up box, where you will select the Rental Event Type from the drop down:

- **Move In**
- **Move Out**
- **Rental Update** – Any change to the household (size, rent, income). This will automatically default to Yes for an annual recertification. Change it to “No” if you need to adjust rent, income or household size outside of an annual recertification.

Enter the Date the *event occurred* from the calendar (do not enter the current date unless you are entering events in real-time), the income, rent, and household size.

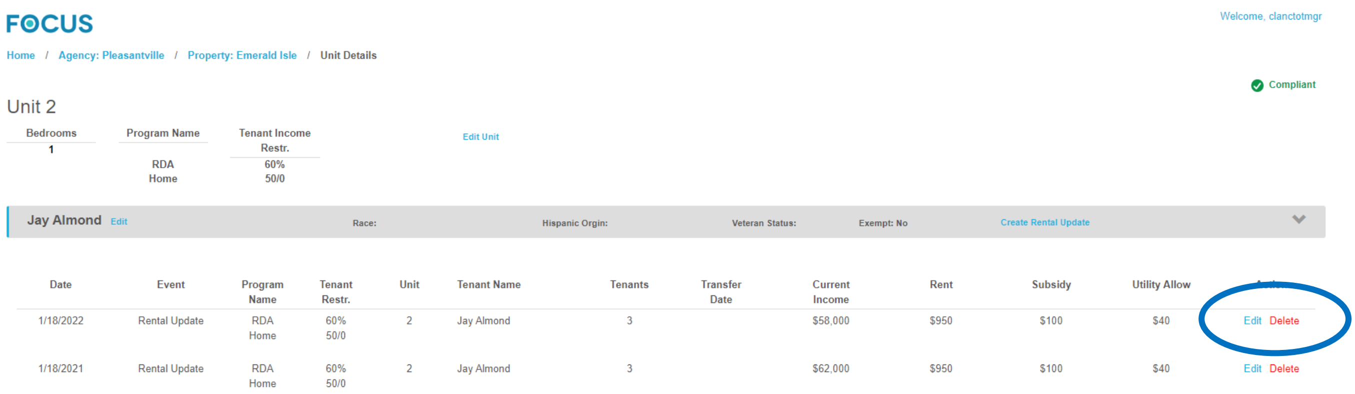
You can add, remove, or change the set-aside here. Once all your edits/updates have been made, press the save button.



Editing Events

If you need to change any details in an event, please do so by ***editing*** the already entered event, rather than adding a new one.

- From the Units tab, double click on a unit row and then click on the “>” to see the complete unit history in the Unit Details page
- From this screen you can *Edit* an existing event or *Delete* a duplicate. Only use Delete if the event was erroneously added. Do not delete an event because the tenant has moved out.

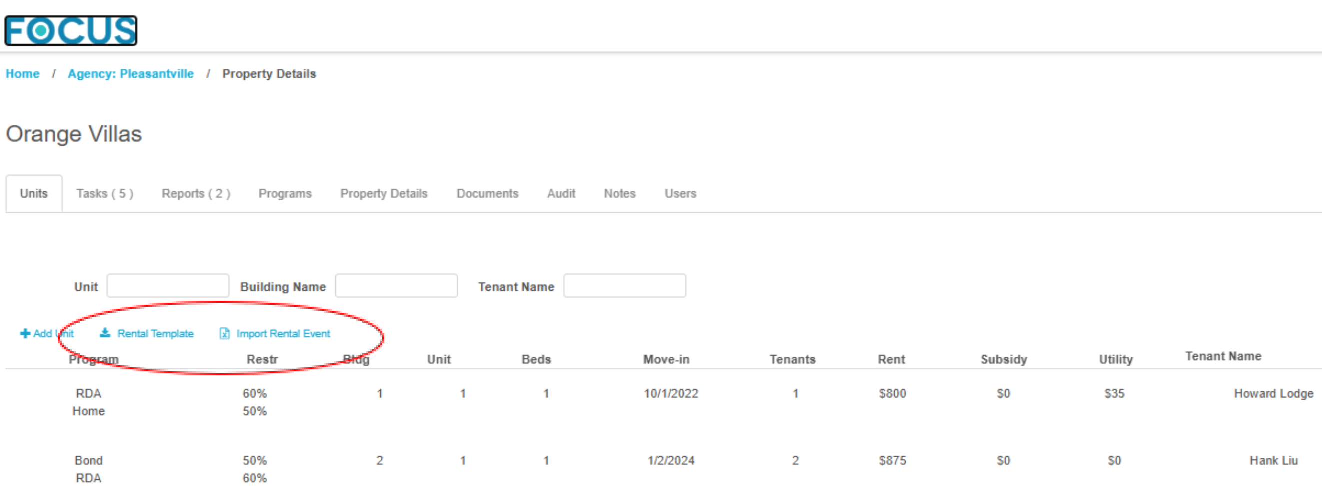


Updating Units by Uploading Events via Spreadsheet

If you would prefer to update events by uploading a spreadsheet, first, download the template by clicking “Rental Template” from the **Units** tab. This will download an excel file onto your computer, which you can edit or paste tenant information into. Please be sure to not delete any columns from the template.

Once the file is updated, you can then upload it via the “Import Rental Event” link, also circled below.

Please be aware that any Rental Update uploaded by spreadsheet will be considered an annual recertification. If you only want to update a rent or utility allowance amount, please do so directly on the website.



Tasks Tab

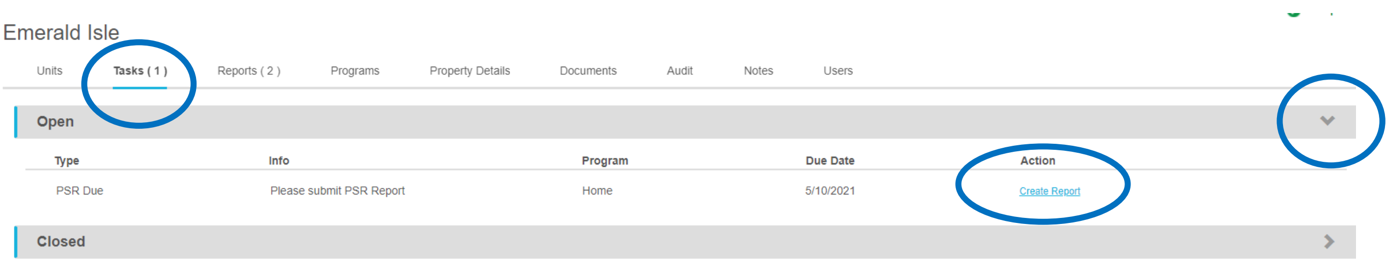
The **Tasks** tab enables Property Managers to view open and closed Tasks and submit reports.

1. The **Tasks** tab contains two sub-tabs

- **Open** – Indicates reports that need to be submitted by management
- **Closed** – Tasks that have been closed

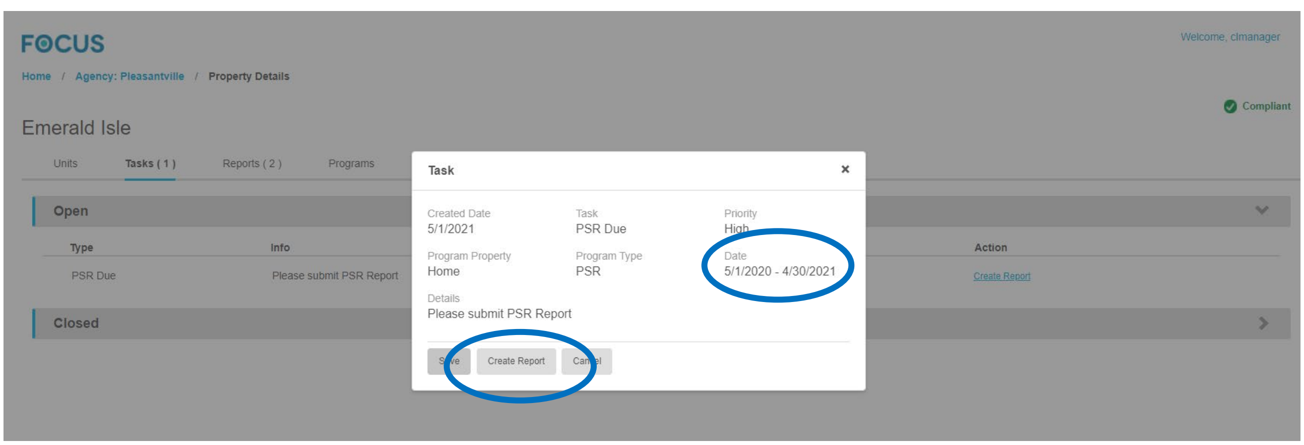
! If you have open tasks for a property, you will see a circled number on the tab next to the word Tasks. This indicates the number of open Tasks for the property.

2. Click on the **Open** arrow drop down to see any open Tasks. As soon as all of your units are updated, you can Create and Submit Reports through the Tasks tab.



3. When you click "Create Report" a pop-up window will open reminding you which report (PSR) you are creating for the program (HOME) and what the reporting period is (5/1/2020-4/30/2021).

*It is important to make a note of the *reporting period*. Any events entered after the reporting period ends (4/30/2021 in this example) will not show up on this report.

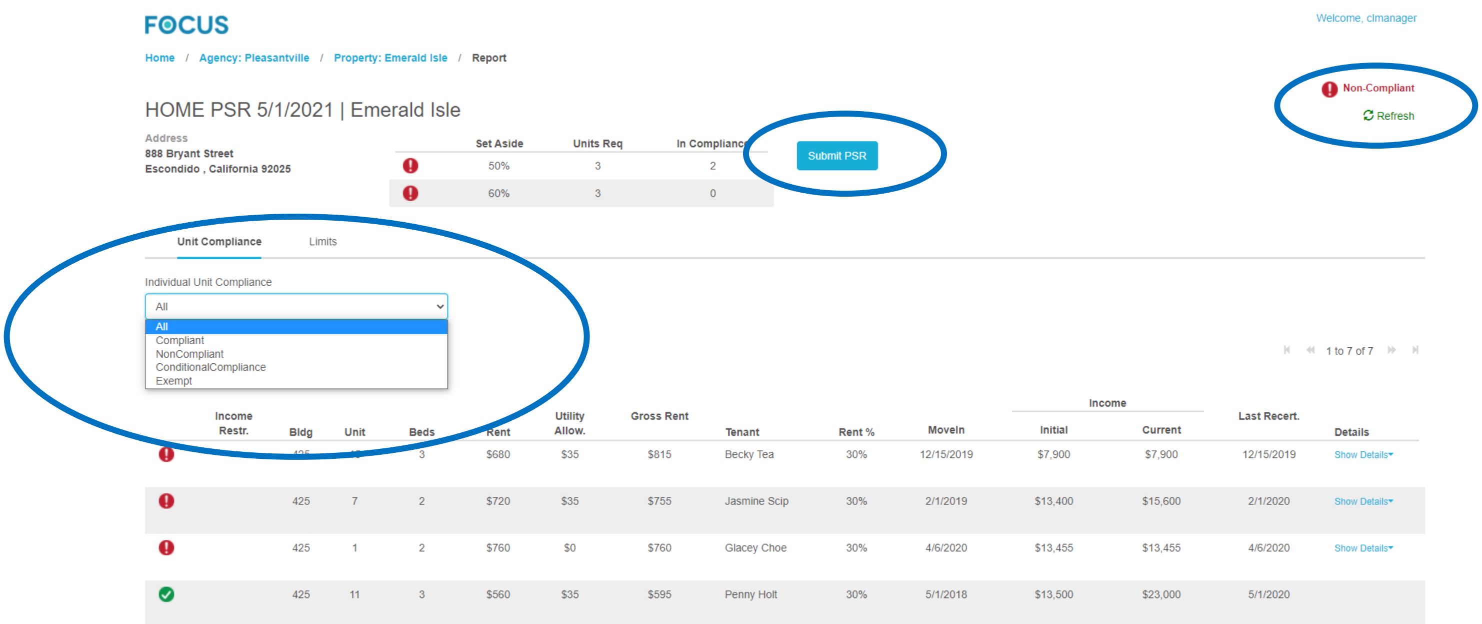


4. Press the Create Report button and then the Property data will process to produce a Property Status Report (PSR).

5. Once the Property Status Report (PSR) has been created you can view the compliance before submitting report. A summary of the compliance status is available at the top of the page.

In order to view all noncompliant units, Select "NonCompliant" from the Individual Unit Compliance dropdown.

If additional updates or corrections need to be made, click Close at the bottom of the page and return to the Units tab for updates.



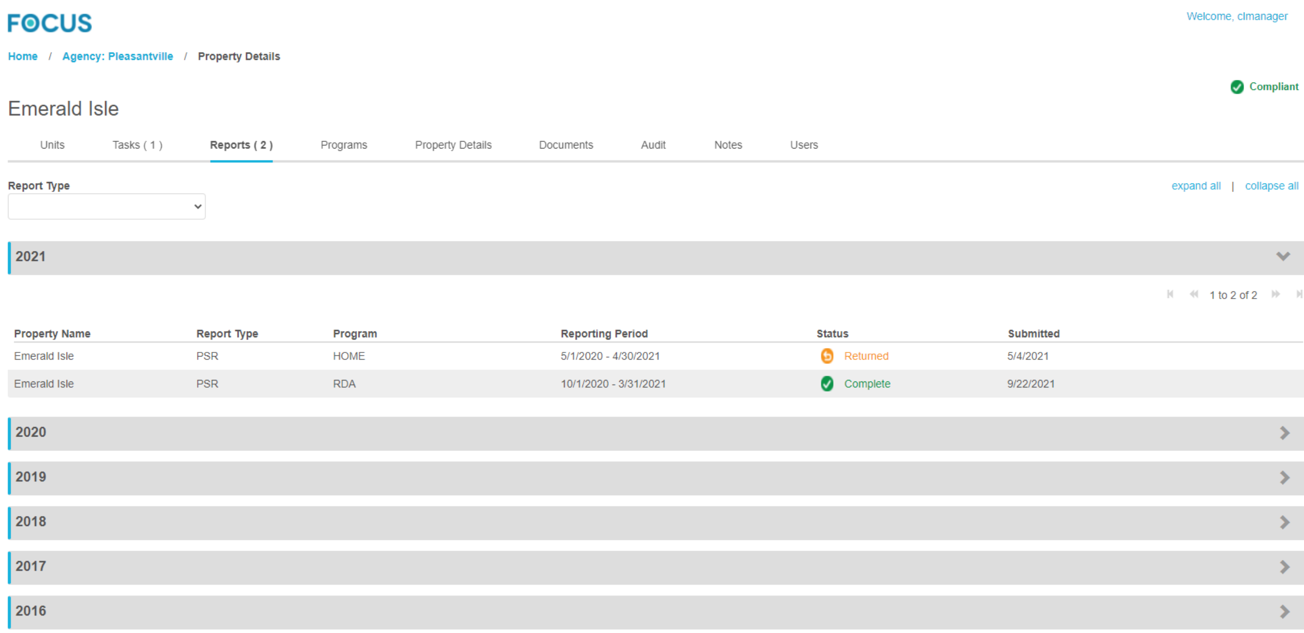
6. If you have made any changes to units and do not see the updates when you recreate a PSR, click **Refresh** in the upper right-hand corner of the PSR. Sometimes the report needs to be reminded to update.

7. As soon as you are satisfied with the report, click the blue Submit PSR button. If you have *any* units marked out of compliance (red) PLEASE include an explanation of the noncompliance in the text box after you click submit.

The Task will now be marked closed.

Reports Tab

The **Reports** tab provides a list of all completed and pending Reports for the selected property. Any number after Reports(2), indicates that the Agency has reports to review.



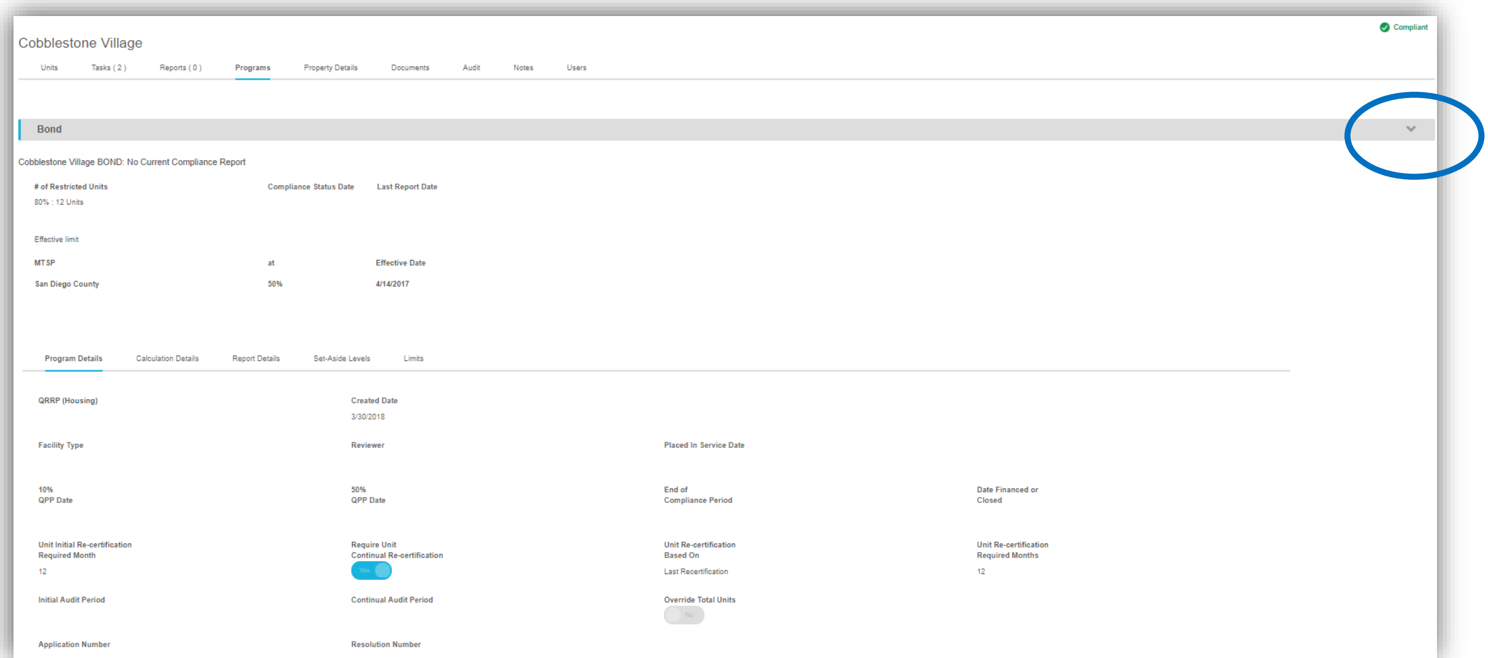
Programs Tab

The Programs tab lists all regulatory restrictions for each program being monitored.

❶ In order to open up a program, click on the ">" to open the Program specifics

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

- **Program Details** – Compliance dates.
- **Calculation Details** – Income and rent limit source and rent calculation.
- **Report Details –** Reporting due dates and frequency.
- **Set-Aside Levels** – Indicates how many units are restricted at each income and rent limit percentages.
- **Limits –** Chart of the current and historic income and rent limits. Click **Change Date** to pull income and rent limits for a specific date.



Property Details Tab

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

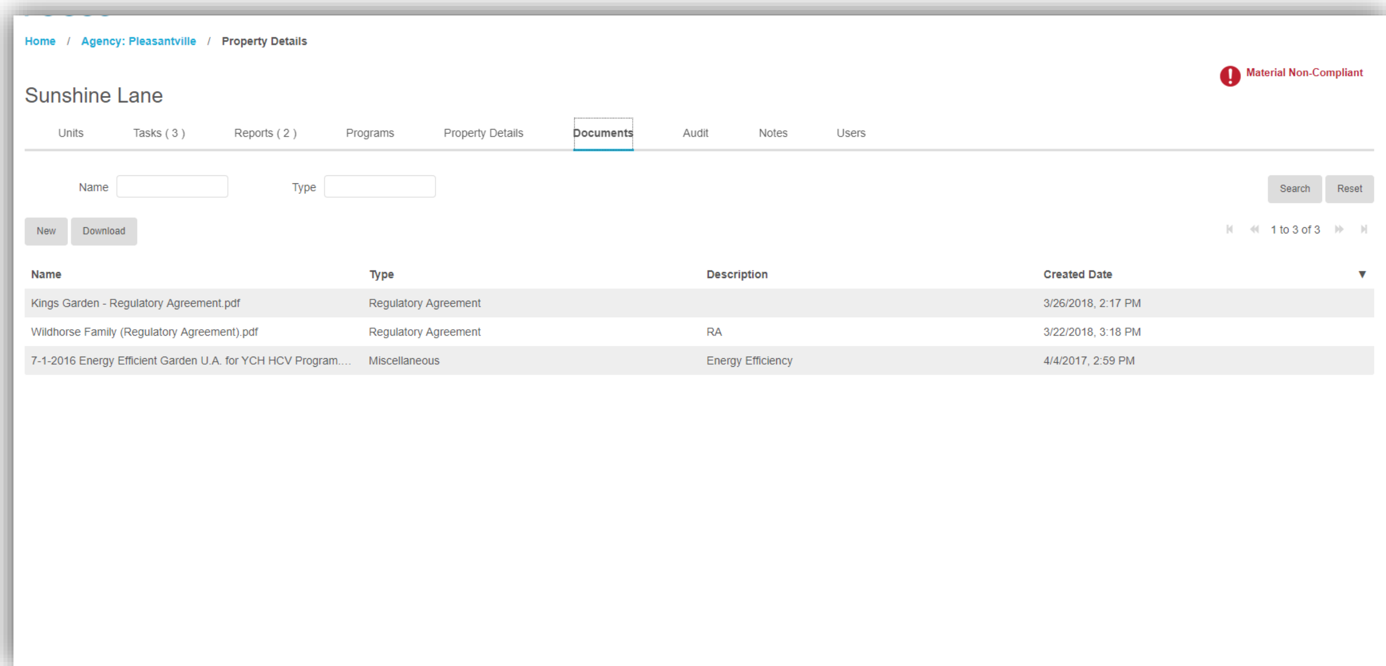
- Agency name
- Address (property address)
- Property type
- Current status
- Number of Units

Documents Tab

The Documents tab is a document retention center for the Agency and Property Managers. All of the Regulatory Agreements have been uploaded for you and are available to view by double clicking on the document. You can view documents and upload new documents—do not upload any tenant specific documents or verifications.

When uploading documents, you can classify them into the following sections:

- Regulatory Agreement
- Legal Documents
- Correspondences
- Miscellaneous



Audit Tab

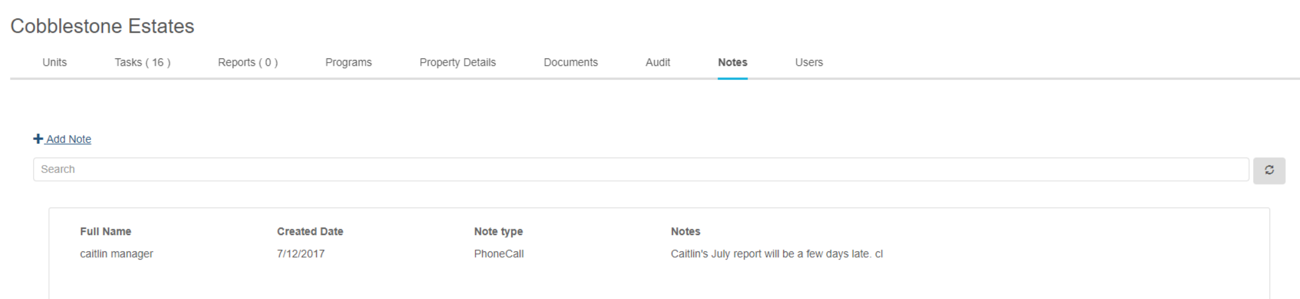
The **Audit** tab provides a consolidated list of all audits that have been completed at the property.

❶You have the ablility to view the **Current Audit** and see **History**.

Notes Tab

The **Notes** tab allows users to track any important correspondence or compliance requirement. This should not be used to enter any tenant specific information.

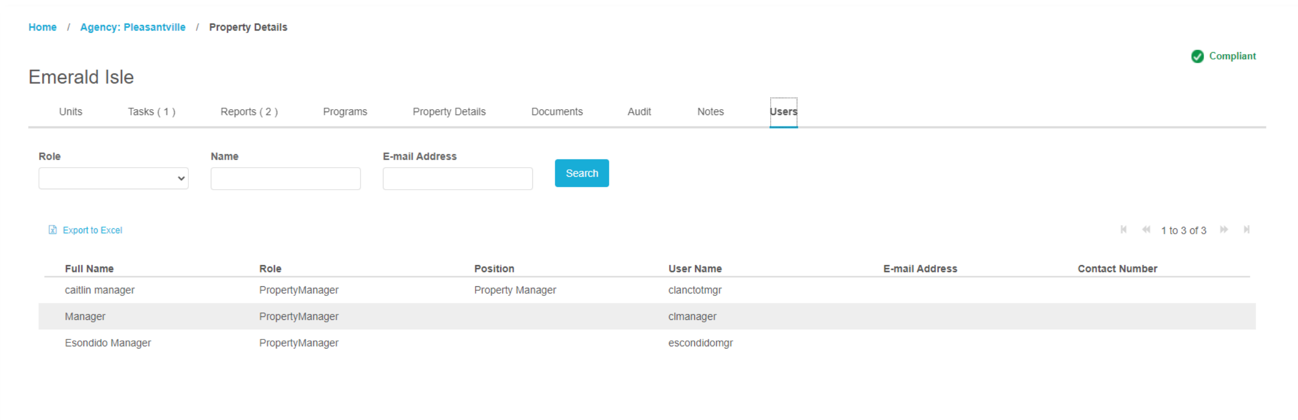
❶ Click the **Add Note** button to input a new note. All users with accesss to the property will be able to see any notes in this tab. Each note will be dated and marked with the user who created the Note.



Users Tab

The **Users** tab list all of the contacts in relation to the property. The following information is provided on each User:

- Full Name
- User Role
- Position
- User Name
- Email Address
- Contact Number



*If you see outdated information or a User listed that no longer works at that site or for the company, please let Compliance Services know so this data remains current and accurate.

All Users listed on this page will receive email notices regarding New Tasks, submitted and accepted reports.

Questions?

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

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