



# 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](https://focus.housingcompliance.org)

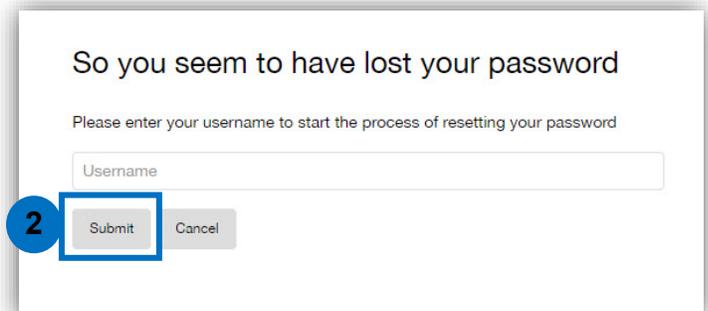
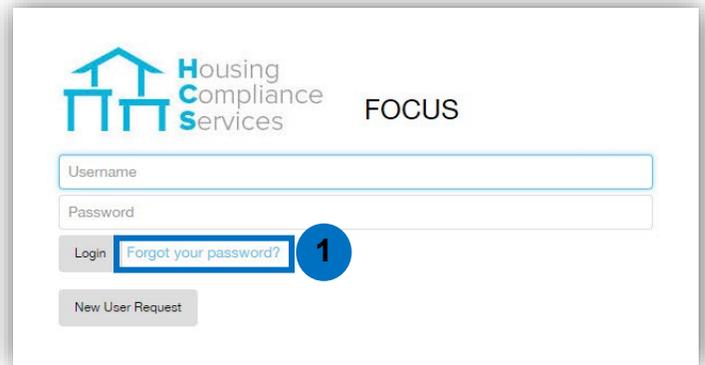
1 Enter the username and password you were provided and then click **LOGIN**.



## Lost Password

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

2 You will be prompted to enter your username (firstlastname). Click **Submit**. The website will email you a link to reset 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 that provides a summary of the portfolio and is the starting point for accessing the property information.
- 2 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.
- 3 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:

The screenshot shows the FOCUS Homepage interface. At the top, there are search filters for Agency, Property, and Company, along with a Search button and a link to advanced search. Below the filters is a table with 4 rows of property data. Each row contains columns for Property Name, City, County, Agency, Units, and several report icons (Bond, PSR Home, RDA, CCPC Bond, CDLAC Bond, P.Ben), and a Status column. The icons are colored and shaped to represent different report statuses: Accepted (green checkmark), Submitted (blue arrow), Returned (orange arrow), and Due/Overdue (red L).

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

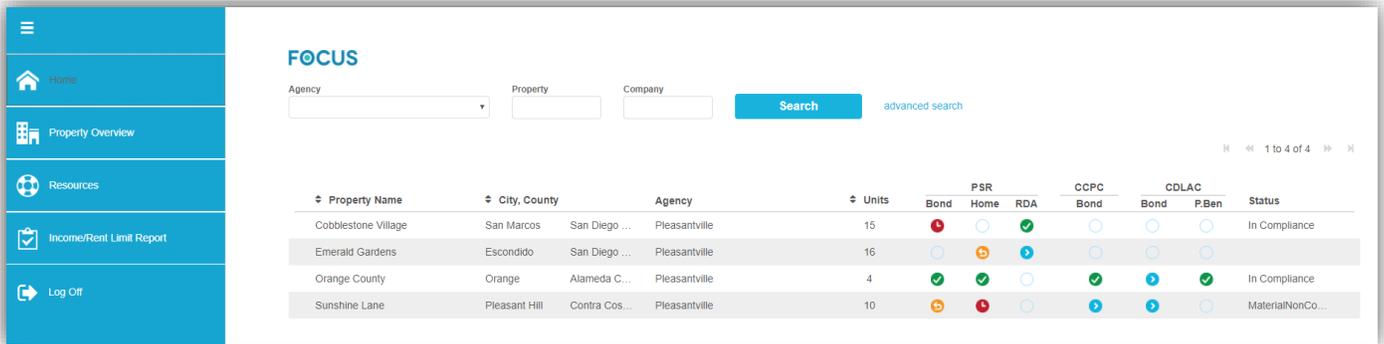
- Accepted
- Submitted
- Returned
- Due/Overdue

# Left Hand Tool Bar

On the left hand tool bar you will see 5 options

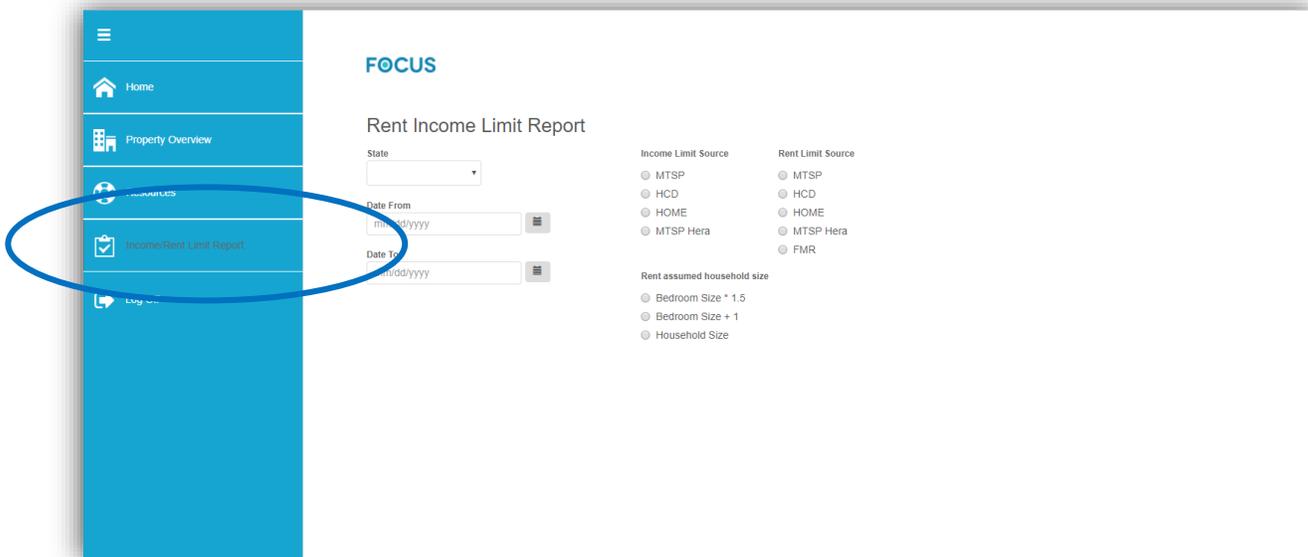
The options are as follows:

- 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



## Income/Rent Limit Report

- 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 household size, and the set-asides).



## Property Details

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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

① 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	Action
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”.

Unit	Beds	Move-in	Tenants	Rent	Subsidy	Utility	Tenant Name	Curr Income	Recert.	Transfer Date	Action
1	1	1/15/2023	2	\$820	\$0	\$44	Heidi	\$14,321	1/15/2024		Action
12	1	1/2/2024	2	\$990	\$0	\$40	Veronica	\$31,890	1/2/2024		Action
14	1	7/25/2023	2	\$1,000	\$0	\$45	Patricia	\$32,890	7/25/2024	9/30/2024	Action

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.

Unit 2

Bedrooms 1	Program Name RDA Home	Tenant Income Restr. 60% 50/0	<a href="#">Edit Unit</a>
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Jay Almond <a href="#">Edit</a>	Race:	Hispanic Origin:	Veteran Status:	Exempt: No	<a href="#">Create Rental Update</a>
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Date	Event	Program Name	Tenant Restr.	Unit	Tenant Name	Tenants	Transfer Date	Current Income	Rent	Subsidy	Utility Allow	<a href="#">Edit</a> <a href="#">Delete</a>
1/18/2022	Rental Update	RDA Home	60% 50/0	2	Jay Almond	3		\$58,000	\$950	\$100	\$40	<a href="#">Edit</a> <a href="#">Delete</a>
1/18/2021	Rental Update	RDA Home	60% 50/0	2	Jay Almond	3		\$62,000	\$950	\$100	\$40	<a href="#">Edit</a> <a href="#">Delete</a>

### 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.

### Orange Villas

<b>Units</b>	Tasks ( 5 )	Reports ( 2 )	Programs	Property Details	Documents	Audit	Notes	Users
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Unit  Building Name  Tenant Name

- [+ Add Unit](#)
- [Rental Template](#)
- [Import Rental Event](#)

Program	Restr	Bldg	Unit	Beds	Move-in	Tenants	Rent	Subsidy	Utility	Tenant Name
RDA Home	60% 50%	1	1	1	10/1/2022	1	\$800	\$0	\$35	Howard Lodge
Bond RDA	50% 60%	2	1	1	1/2/2024	2	\$875	\$0	\$0	Hank Liu

### Tasks Tab

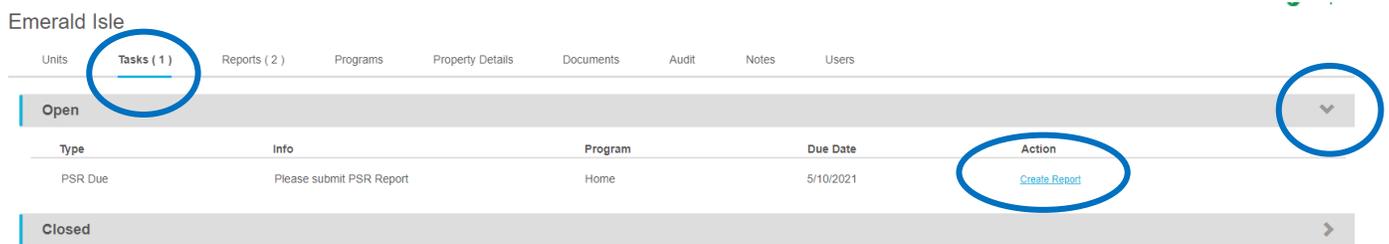
The **Tasks** tab enables Property Managers to view open and closed Tasks and submit reports.

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

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

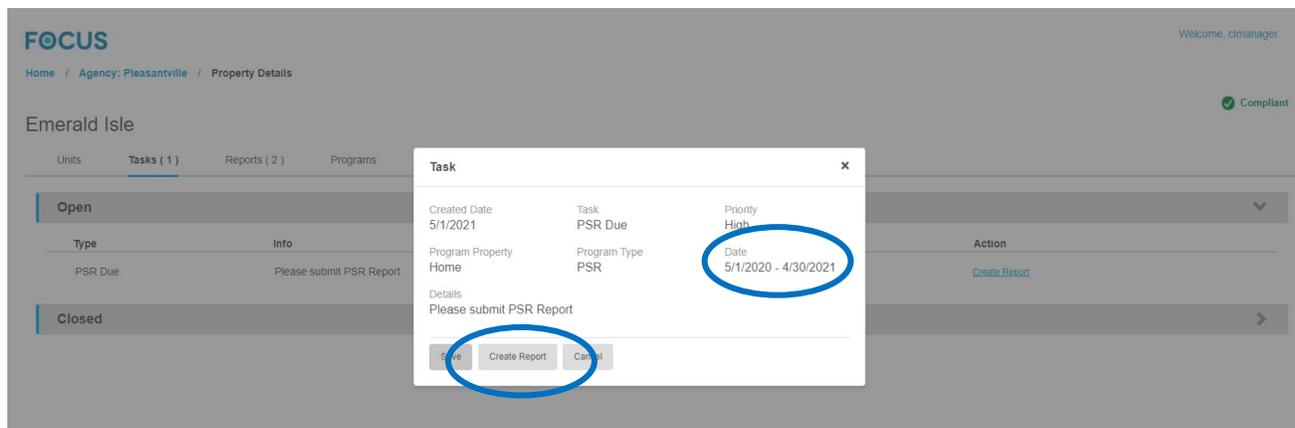
 If you have open tasks for a property, you will see a circled number on the tab next to the word Tasks. This indicates the number of open Tasks for the property.

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.

**FOCUS**

Welcome, cmanager

Home / Agency: Pleasantville / Property: Emerald Isle / Report

HOME PSR 5/1/2021 | Emerald Isle

Address  
888 Bryant Street  
Escondido, California 92025

	Set Aside	Units Req	In Compliance
50%	3	2	
60%	3	0	

Submit PSR

Non-Compliant  
Refresh

Unit Compliance Limits

Individual Unit Compliance

All  
All  
Compliant  
NonCompliant  
ConditionalCompliance  
Exempt

1 to 7 of 7

Income Restr.	Bldg	Unit	Beds	Rent	Utility Allow.	Gross Rent	Tenant	Rent %	MoveIn	Income		Last Recert.	Details
										Initial	Current		
!	425	1	3	\$680	\$35	\$815	Becky Tea	30%	12/15/2019	\$7,900	\$7,900	12/15/2019	Show Details
!	425	7	2	\$720	\$35	\$755	Jasmine Scip	30%	2/1/2019	\$13,400	\$15,600	2/1/2020	Show Details
!	425	1	2	\$760	\$0	\$760	Glacey Choe	30%	4/6/2020	\$13,455	\$13,455	4/6/2020	Show Details
✓	425	11	3	\$560	\$35	\$595	Penny Holt	30%	5/1/2018	\$13,500	\$23,000	5/1/2020	Show Details

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.

**FOCUS**

Welcome, cmanager

Home / Agency: Pleasantville / Property Details

 Compliant

Emerald Isle

Units    Tasks ( 1 )    **Reports ( 2 )**    Programs    Property Details    Documents    Audit    Notes    Users

Report Type

[expand all](#) | [collapse all](#)

Property Name	Report Type	Program	Reporting Period	Status	Submitted
Emerald Isle	PSR	HOME	5/1/2020 - 4/30/2021	 Returned	5/4/2021
Emerald Isle	PSR	RDA	10/1/2020 - 3/31/2021	 Complete	9/22/2021

2021 

2020 

2019 

2018 

2017 

2016 

# Programs Tab

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

1 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.

Cobblestone Village Compliant

Units Tasks (2) Reports (0) **Programs** Property Details Documents Audit Notes Users

**Bond** ▼

Cobblestone Village BOND: No Current Compliance Report

# of Restricted Units	Compliance Status Date	Last Report Date
80% : 12 Units		

Effective limit

MTSP	at	Effective Date
San Diego County	50%	4/14/2017

Program Details Calculation Details Report Details Set-Aside Levels Limits

QRRP (Housing)	Created Date	3/30/2018	
Facility Type	Reviewer	Placed In Service Date	
10% QFP Date	50% QFP Date	End of Compliance Period	Date Financed or Closed
Unit Initial Re-certification Required Month	Require Unit Continual Re-certification	Unit Re-certification Based On	Unit Re-certification Required Months
12	12	Last Recertification	12
Initial Audit Period	Continual Audit Period	Override Total Units	
Application Number	Resolution Number		

## 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 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

The screenshot shows the 'Documents' tab interface for 'Sunshine Lane'. At the top, there is a breadcrumb trail: 'Home / Agency: Pleasantville / Property Details'. A red notification icon with an exclamation mark and the text 'Material Non-Compliant' is visible in the top right corner. Below the property name, there is a navigation menu with tabs: 'Units', 'Tasks (3)', 'Reports (2)', 'Programs', 'Property Details', 'Documents' (which is highlighted), 'Audit', 'Notes', and 'Users'. Below the navigation menu, there are search filters for 'Name' and 'Type', each with an input field. To the right of these filters are 'Search' and 'Reset' buttons. Below the filters, there are 'New' and 'Download' buttons. On the right side, there is a pagination control showing '1 to 3 of 3' with navigation arrows. The main content area contains a table with the following data:

Name	Type	Description	Created Date
Kings Garden - Regulatory Agreement.pdf	Regulatory Agreement		3/26/2018, 2:17 PM
Wildhorse Family (Regulatory Agreement).pdf	Regulatory Agreement	RA	3/22/2018, 3:18 PM
7-1-2016 Energy Efficient Garden U.A. for YCH HCV Program...	Miscellaneous	Energy Efficiency	4/4/2017, 2:59 PM

## Audit Tab

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

① You have the ability to view the **Current Audit** and see **History**.

## Notes Tab

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

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. Each note will be dated and marked with the user who created the Note.

Cobblestone Estates

Units    Tasks ( 16 )    Reports ( 0 )    Programs    Property Details    Documents    Audit    **Notes**    Users

[+ Add Note](#)

Search



Full Name	Created Date	Note type	Notes
caillin manager	7/12/2017	PhoneCall	Caillin's July report will be a few days late. ci

# 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

The screenshot shows a web application interface for the 'Users' tab. At the top, there is a breadcrumb trail: 'Home / Agency: Pleasantville / Property Details'. A 'Compliant' status indicator with a green checkmark is visible in the top right corner. Below the breadcrumb, the property name 'Emerald Isle' is displayed. A navigation menu includes 'Units', 'Tasks (1)', 'Reports (2)', 'Programs', 'Property Details', 'Documents', 'Audit', 'Notes', and 'Users' (which is highlighted). Below the navigation menu, there is a search form with three input fields: 'Role' (a dropdown menu), 'Name', and 'E-mail Address', followed by a blue 'Search' button. Below the search form, there is a link to 'Export to Excel' and a pagination indicator showing '1 to 3 of 3'. The main content area contains a table with the following data:

Full Name	Role	Position	User Name	E-mail Address	Contact Number
catlin manager	PropertyManager	Property Manager	clanctomgr		
Manager	PropertyManager		cmanager		
Esondido Manager	PropertyManager		escondidomgr		

\*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?

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

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(925) 280-4394

**Chris Walker**

[chris@cpwalkerconsulting.com](mailto:chris@cpwalkerconsulting.com)

(916) 296-4915