



FOCUS Software Property Manager User's Guide

April 2018

Housing Compliance Services

2999 Oak Road, Suite 710

Walnut Creek, CA 94597

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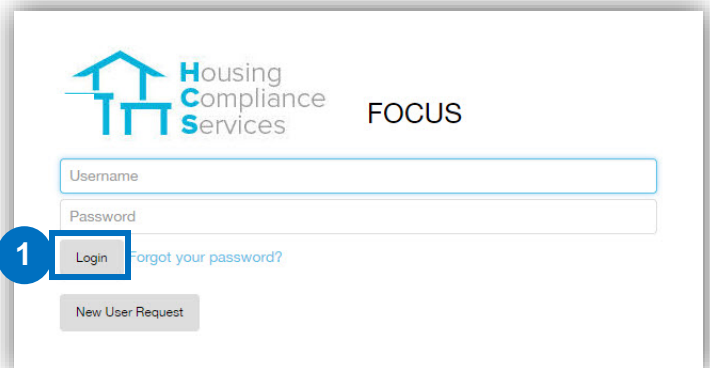
Accessing FOCUS

Login to FOCUS

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

Go to focus.housingcompliance.org

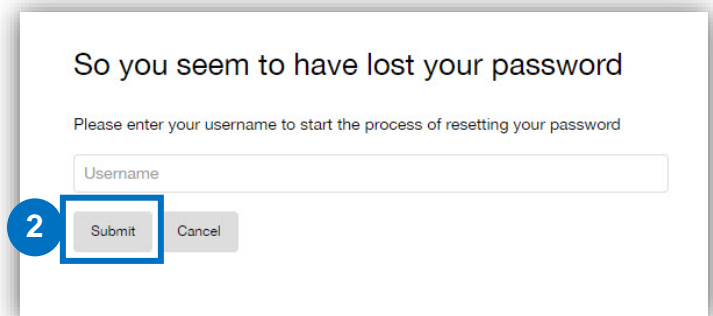
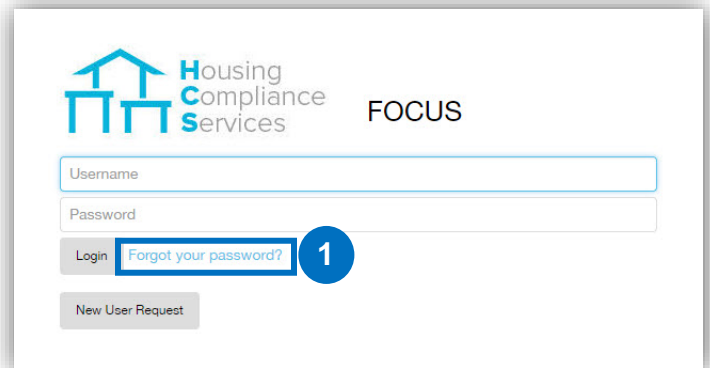
1 Enter the username and password you were provided and then click **LOGIN**.



Lost Password

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

2 You will be prompted to enter your username. 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 that provides a summary of the portfolio and is the starting point for accessing the property information.
- 2 All the properties assigned to your user name will be displayed on the homepage.
- 3 To choose a specific property, double-click on the property row 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 left is the FOCUS logo. To the right is a user greeting: "Welcome, mbaumbach". Below the logo is a search bar with three input fields: "Agency", "Property", and "Company", followed by a "Search" button and a link to "advanced search". A blue circle with the number "1" is positioned above the search bar. Below the search bar is a table with the following columns: "Property Name", "City, County", "Agency", "Units", "Bond", "PSR Home", "RDA", "CCPC Bond", "CDLAC Bond", "P.Ben", and "Status". A blue circle with the number "2" is positioned above the table header. The table contains four rows of property data. A blue circle with the number "3" is positioned to the left of the first row. The table data is as follows:

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

Icon Legend:

-  Report Approved
-  Report Submitted
-  Report Returned to Submitter
-  Report is Due

Left Hand Tool Bar

1 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 add a specific income and rent limit report (see below)
- Log-Off

The screenshot shows the FOCUS software interface. On the left is a blue tool bar with five options: Home, Property Overview, Resources, Income/Rent Limit Report, and Log Off. The main area displays a search bar with fields for Agency, Property, and Company, and a Search button. Below the search bar is a table with the following data:

Property Name	City, County	Agency	Units	Bond	PSR Home	RDA	CPCG Bond	CDLAC Bond	P.Ben	Status
Cobblestone Village	San Marcos San Diego	Pleasantville	15	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	In Compliance
Emerald Gardens	Escondido San Diego	Pleasantville	16	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	In Compliance
Orange County	Orange Alameda C.	Pleasantville	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	In Compliance
Sunshine Lane	Pleasant Hill Contra Cos...	Pleasantville	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	MaterialNonCo...

2 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.

The screenshot shows the FOCUS software interface for the 'Rent Income Limit Report' form. The form includes the following fields and options:

- State:
- Date From:
- Date To:
- Income Limit Source:
 - MTSP
 - HCD
 - HOME
 - MTSP Hera
- Rent Limit Source:
 - MTSP
 - HCD
 - HOME
 - MTSP Hera
 - FMR
- Rent assumed household size:
 - Bedroom Size * 1.5
 - Bedroom Size + 1
 - Household Size

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:

- 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.

FOCUS Welcome

Home / Agency: Pleasantville / Property Details

Emerald Gardens

1 **Units** Tasks (1) Reports (4) Programs Property Details Documents Audit Notes Users

[+ Add Unit](#) [Rental Template](#) [Import Rental Event](#) [Set RDA Set Aside](#) [Set Home Set Aside](#)

Program	Restr	Bldg	Unit	Beds	Size	Tenants	Rent	Subsidy	Utility	Tenant Name	Curr Income	Recert.
RDA	50%	425	1	2		4	\$600	\$	\$45	Ben Sharpie	\$23,455	1/16/2018
Home	60%											
RDA	50%	425	14	3		2	\$280	\$	\$30	Bobby Brown	\$100,000	3/5/2018
Home	60%	425	15A	3		2	\$670	\$	\$90	Whitney Houston	\$67,000	3/7/2018
Home	60%	425	15A	3		2	\$430	\$60	\$100	Martha Stewart	\$13,000	3/3/2018
RDA	50%	425	2	1						Vacant		
RDA	50%	425	4	1		2	\$200	\$300	\$40	June Diablo	\$14,999	4/2/2018

Units Tab

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

- **Program** – The specific program(s) being monitored.
- **Restriction** – The set aside percentage specific to the unit for each program.
- **Building** – Building letter or number.
- **Unit** – Unit number.
- **Beds** – The number of bedrooms within the unit.
- **Size** – The square footage of the unit.
- **Tenant** – 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.
- **Utility** – Amount of monthly utility allowance.
- **Tenant Name** – The name of the head of household in the unit.
- **Current Income** – The current annual income of the household.
- **Recertification** – The last date the recertification was performed.

The screenshot shows the FOCUS software interface for 'Emerald Gardens'. The 'Units' tab is selected, displaying a table of unit information. A blue box highlights the table header and the first few rows of data.

Program	Restr	Bldg	Unit	Beds	Size	Tenants	Rent	Subsidy	Utility	Tenant Name	Curr Income	Recert.
RDA	50%	425	1	2		4	\$600	\$	\$45	Ben Sharpie	\$23,455	1/16/2018
Home	60%											
RDA	50%	425	14	3		2	\$280	\$	\$30	Bobby Brown	\$100,000	3/5/2018
Home	60%	425	15A	3		2	\$670	\$	\$90	Whitney Houston	\$67,000	3/7/2018
Home	60%	425	15A	3		2	\$430	\$60	\$100	Martha Stewart	\$13,000	3/3/2018
RDA	50%	425	2	1						Vacant		
RDA	50%	425	4	1		2	\$200	\$300	\$40	June Diablo	\$14,999	4/2/2018

- Double click on a unit to see the complete unit history

Editing Units

The different types of events are:

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

- 1 In order to edit the unit, open the Action button to the right-hand side of the screen and select “Update Event”.
 - If you would like to change a program or set- aside, please click on the program you would like to edit (example: “Edit RDA or Edit Bond” from the Action drop down.

Bldg	Unit	Beds	Size	Tenants	Rent	Subsidy	Utility	Tenant Name	Curr Income	Recert.	Action
425	1	2		4	\$600	\$	\$45	Ben Sharpie	\$23,455	1/16/2018	Action
425	14	3		2	\$280	\$	\$30	Bobby Brown	\$100,000	3/5/2018	Action
425	15A	3		2	\$670	\$	\$90	Whitney Houston	\$67,000	3/7/2018	Action
425	15A	3		2	\$430	\$60	\$100	Martha Stewart	\$13,000	3/3/2018	Action
425	2	1						Vacant			
425	4	1		2	\$200	\$300	\$40	June Diablo	\$14,999	4/2/2018	Action

- 2 This will open a pop-up box that provides drop down for the event type (Move-in/Move-out/Rental Update).
- 3 When updating a Rental Update for an annual recertification, please turn on the recertification button in the right hand corner.
- 4 Once all of your edits/updates have been made, press the save button.

New Event x

Unit 14

Event Type 2

Rental Update

Date

* Date is required

Tenant Name

Bobby Brown

Income (\$)

100000.00

Utility Allowance

30.00

Household Size

2

* Household size is required

Recertification 3

Yes

Bedrooms

3

Race

Hispanic origin

Veteran Status

Rent Subsidy

Rent (\$)

280.00

Additional Details

Save 4

Cancel

Tasks Tab

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

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

2 In the **Tasks** tab there are two sub-tabs:

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

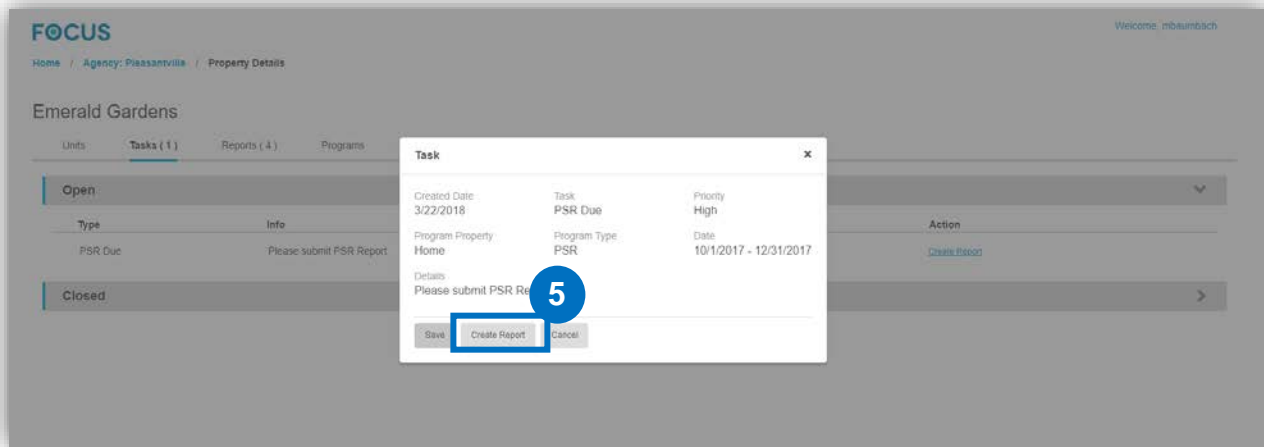
3 Click on the **Open** sub-tab click on then arrow drop down to see any open tasks. As soon as all of your units are updated, you can create reports through the Tasks tab.

4 When you click on “Create Report” a pop-up window will open enabling you to create a report.

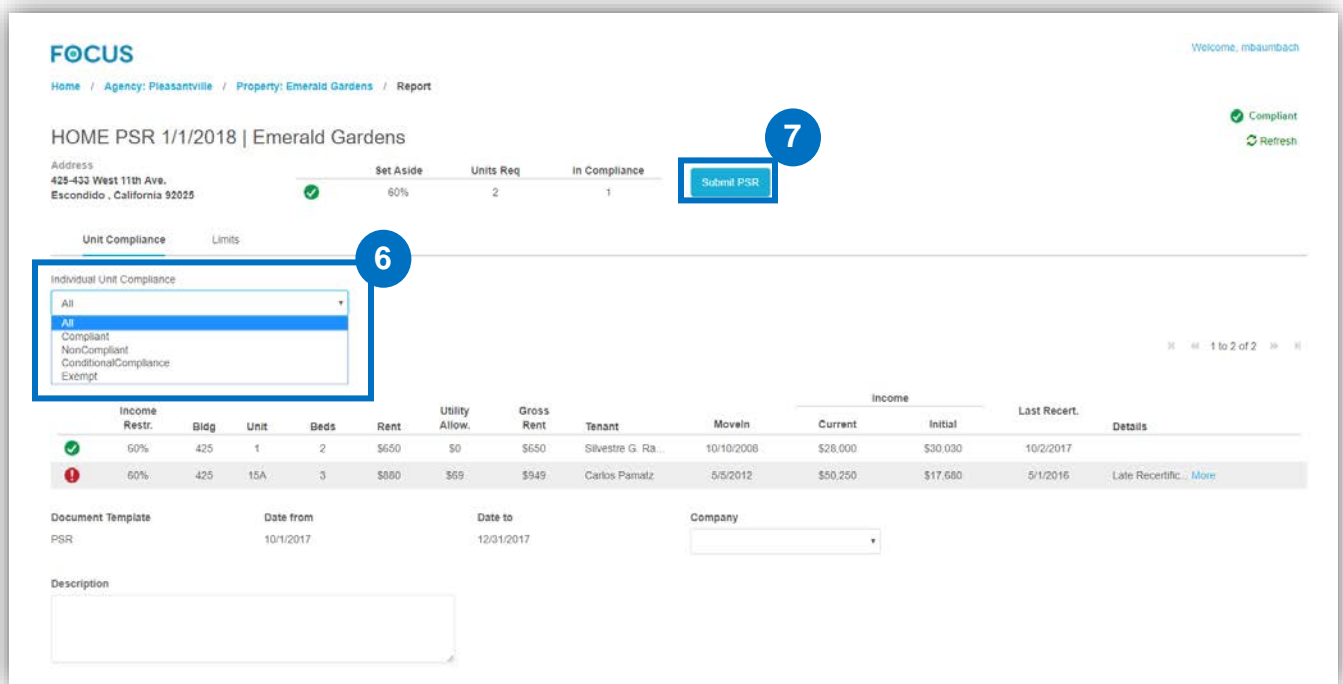
The screenshot displays the FOCUS Property Manager interface. At the top, the logo 'OCUS' is visible on the left, and 'welcome, msbaum@ocn' is on the right. Below the logo, the breadcrumb trail reads 'me / Agency: Pleasantville / Property Details'. The main heading is 'merald Garden'. A navigation bar contains several tabs: 'Units', 'Tasks (1)', 'Reports (4)', 'Programs', 'Property Details', 'Documents', 'Audit', 'Notes', and 'Users'. The 'Tasks (1)' tab is selected and highlighted in blue. Below the navigation bar, there are two sub-tabs: 'Open' and 'Closed'. The 'Open' sub-tab is selected and highlighted in blue. A table of tasks is displayed below the sub-tabs. The table has columns for 'Type', 'Info', 'Program', 'Due Date', and 'Action'. The first row shows a task with 'Type' 'PSR Due', 'Info' 'Please submit PSR Report', 'Program' 'Home', and 'Due Date' '1/10/2018'. The 'Action' column contains a 'Create Report' button. A dropdown arrow is visible in the top right corner of the table area.

Type	Info	Program	Due Date	Action
PSR Due	Please submit PSR Report	Home	1/10/2018	Create Report

- 5 In the pop-up window click the Create Report button and then the Property data will process to produce a Property Status Report (PSR).



- 6 Once the Property Status Report (PSR) has been created you can view the compliance before submitting report.
- 7 As soon as you are satisfied with the report, click the blue Submit PSR button.



Reports Tab

The **Reports** tab provides a consolidated list of all completed and pending Reports for the selected property.

FOCUS Welcome, mbaumbach

Home / Agency: Pleasantville / Property Details

Cobblestone Village Compliant

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

Report Type expand all | collapse all

2018 0 to 0 of 0

Property Name	Report Type	Program	Reporting Period	Status	Submitted
Cobblestone Village	PSR	RDA Program	4/1/2016 - 3/31/2017	Complete	4/4/2017

2017 1 to 1 of 1

Property Name	Report Type	Program	Reporting Period	Status	Submitted
Cobblestone Village	PSR	RDA Program	4/1/2015 - 3/31/2016	Complete	3/19/2018

2016 1 to 1 of 1

Property Name	Report Type	Program	Reporting Period	Status	Submitted
Cobblestone Village	PSR	RDA Program	4/1/2015 - 3/31/2016	Complete	3/19/2018

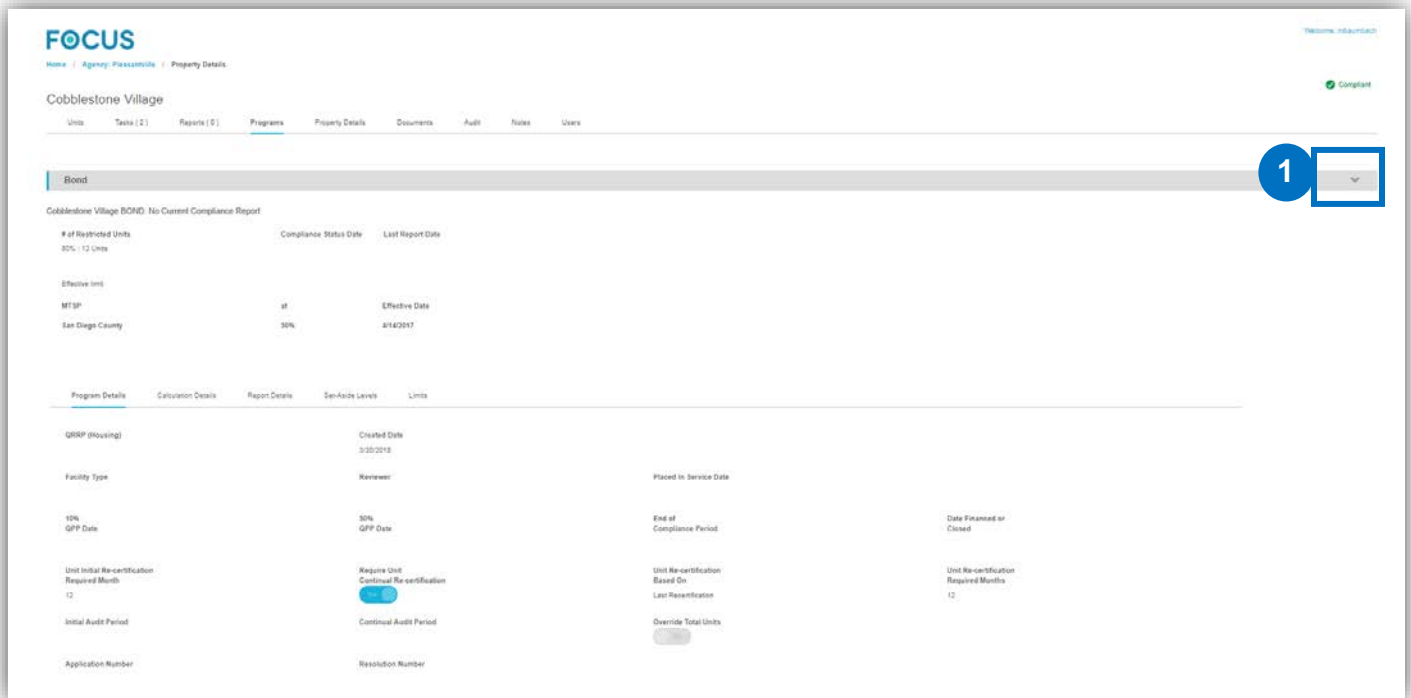
Programs Tab

The Programs tab enables users to see the individual regulatory programs being monitored for each property.

1 In order to open up a program, click on **Program Drop Down**

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

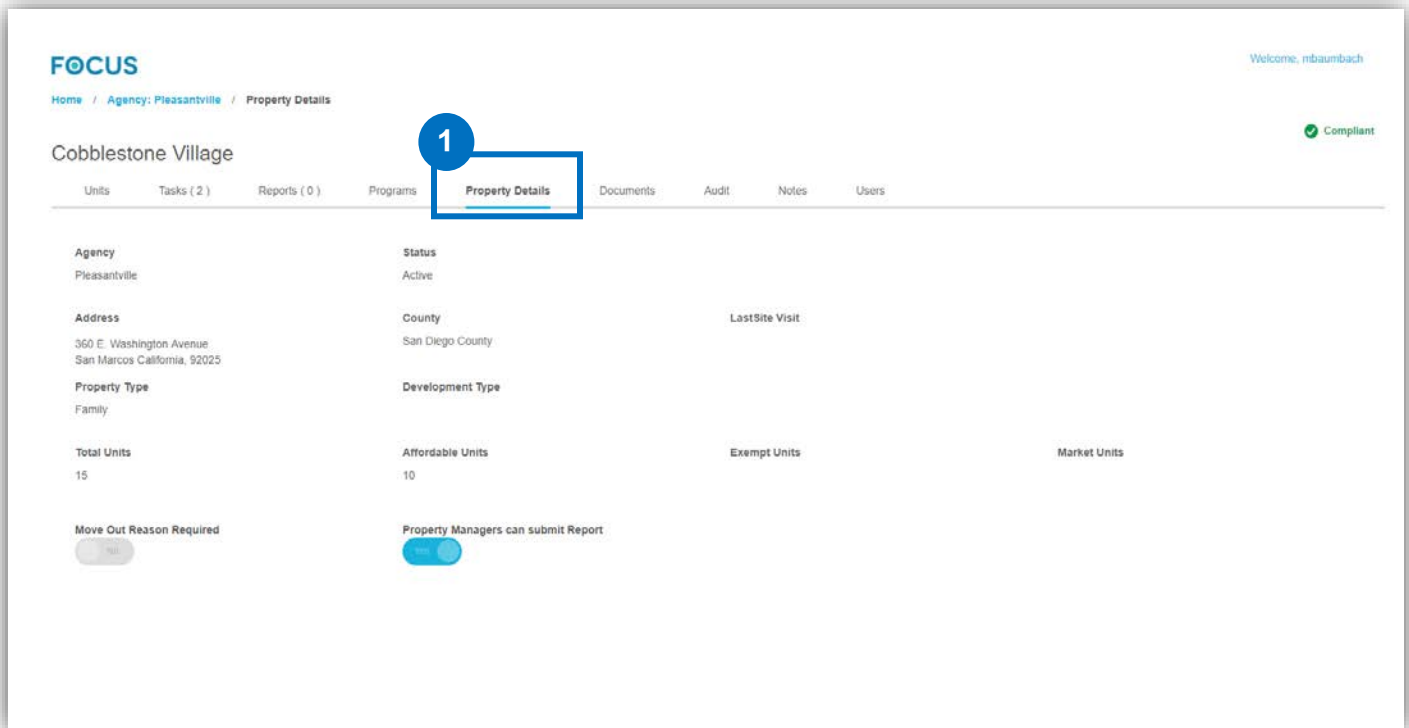
- **Program Details**
- **Calculation Details** – Income and rent limit source.
- **Report Details** – Reporting due dates and frequency.
- **Set-Aside Levels** – Specifies the income and rent limit percentages.
- **Limits** – Chart of the current and historic income and rent limits. Use “Limits in Calculation” to pull income and rent limits for a specific date.



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. You are able to upload new documents and download documents.

When uploading documents, you are able to classify them into the following sections:

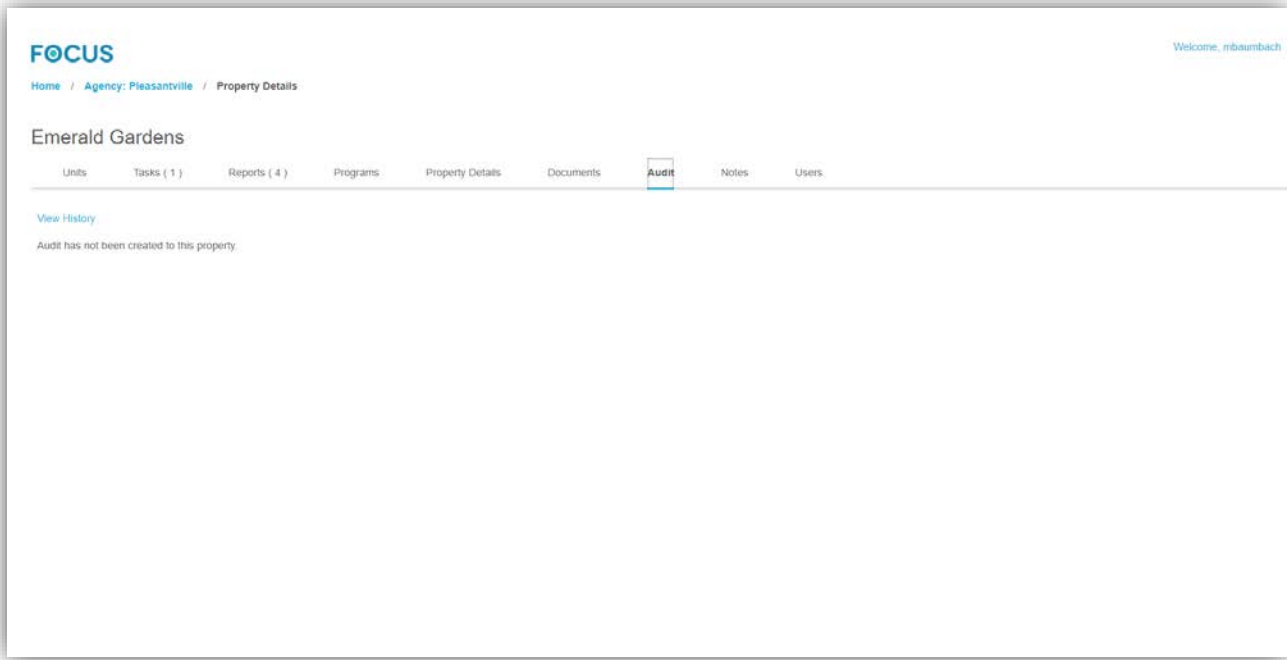
- Regulatory Agreement
- Legal Documents
- Correspondences
- Miscellaneous

The screenshot shows the FOCUS software interface for the 'Sunshine Lane' property. The 'Documents' tab is selected in the navigation menu. The interface includes a search bar with 'Name' and 'Type' filters, and a table of documents. A notification banner at the top right indicates 'Material Non-Compliant'.

Name	Type	Description	Created Date
Kings Garden - Regulatory Agreement.pdf	Regulatory Agreement		3/25/2016, 2:17 PM
Wildhorse Family (Regulatory Agreement).pdf	Regulatory Agreement	RA	3/22/2016, 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

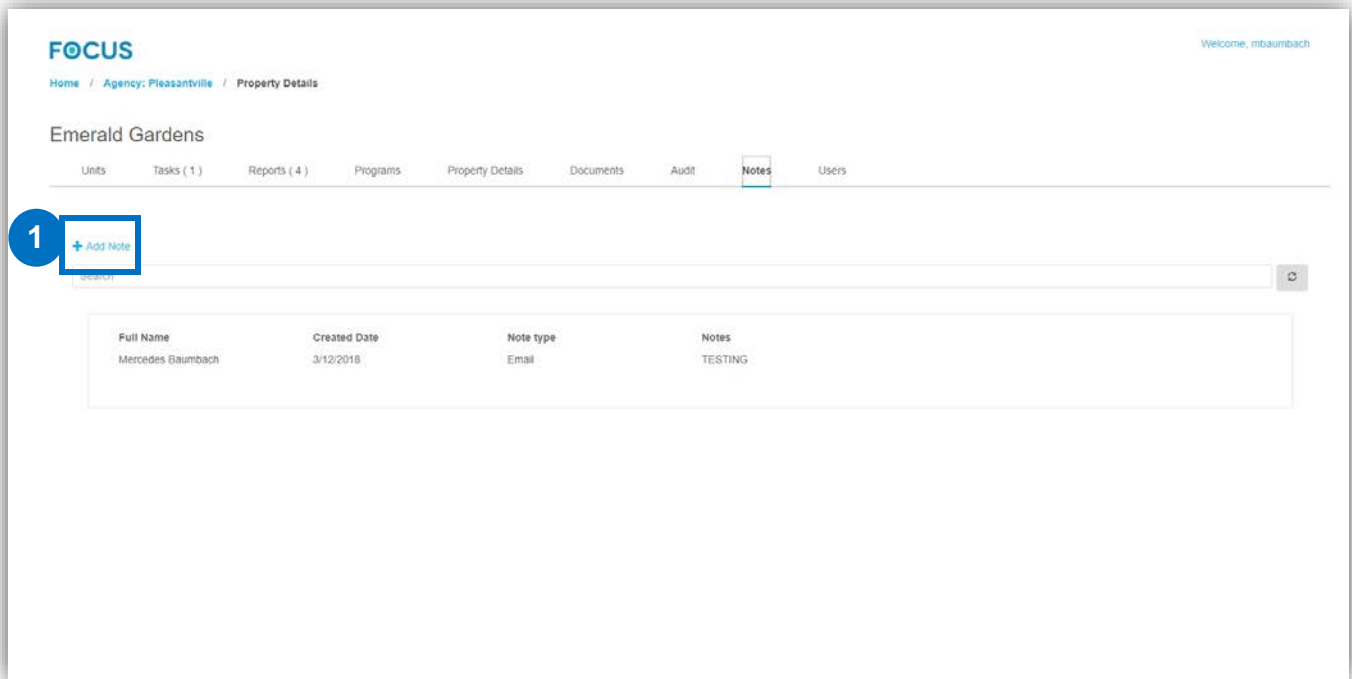
The **Audit** tab provides a consolidated list of any and all audits that have been completed at the property. You have the ability to view the **Current Audit** and see **Audit History**.



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.

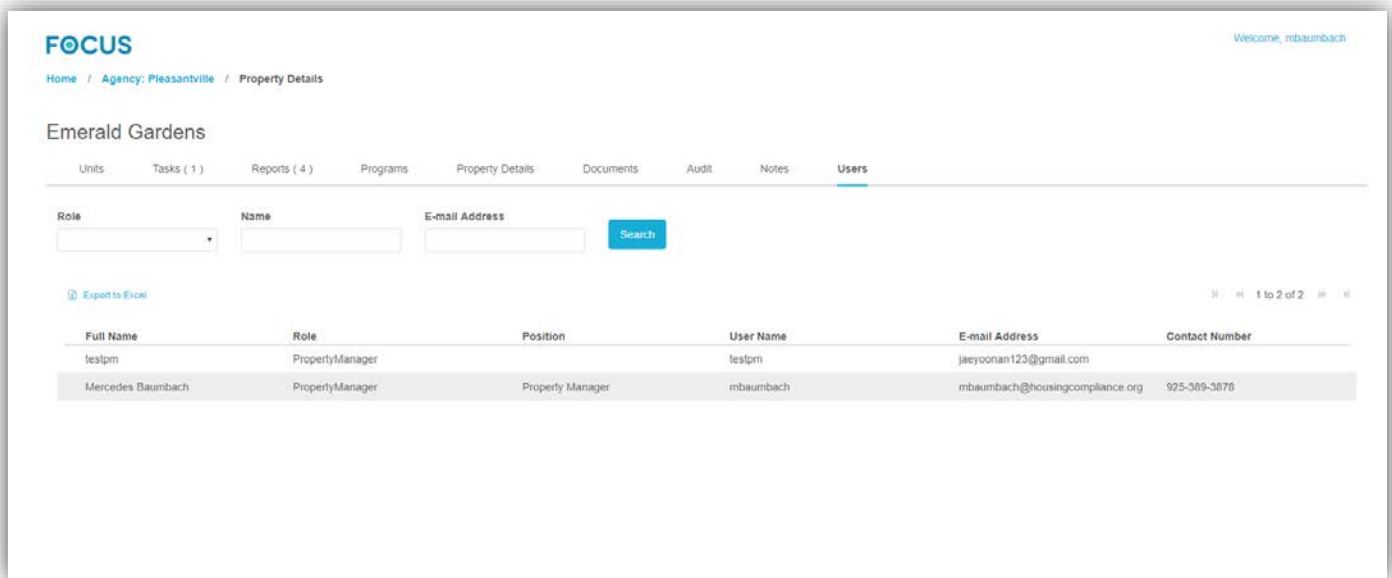
- 1 Click the **Add Note** button to input a new note. All users with access to the property will be able to see any notes in this tab.



Users Tab

When the **Users** tab is selected, the Property Manager will be able to see a list of all contacts in relation to the property. The following formation is provided on each User:

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



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