



FOCUS Software Property Manager User's Guide

July 2022

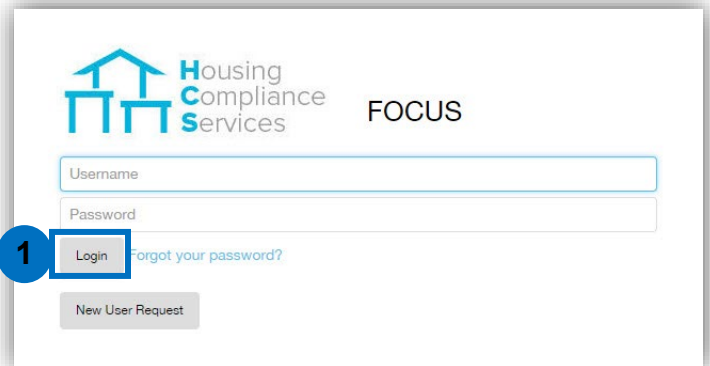
Accessing FOCUS

Login to FOCUS

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

Go to focus.housingcompliance.org

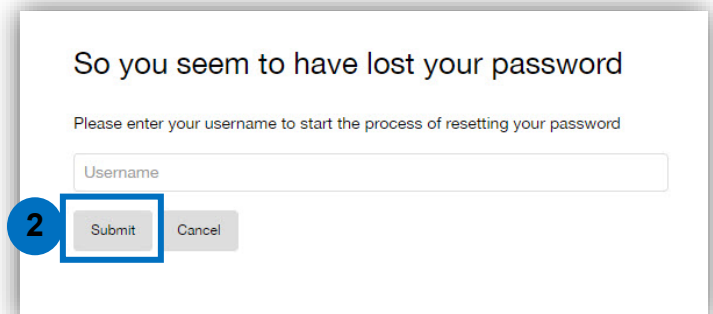
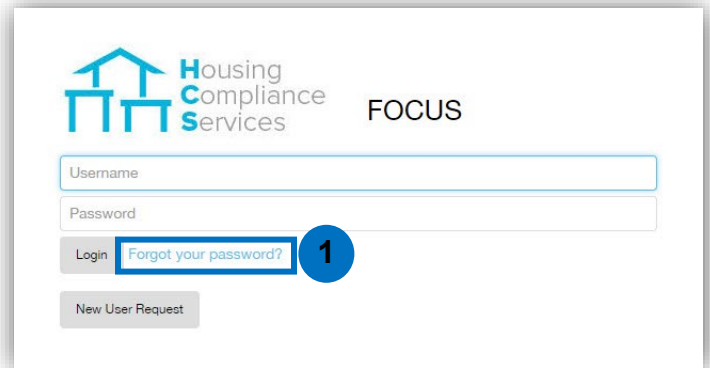
1 Enter the username and password you were provided and then click **LOGIN**.



Lost Password

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

2 You will be prompted to enter your username (first and last name). 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.
- 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.

Icon Legend:

The screenshot shows the FOCUS Homepage interface. At the top, there is a search bar with three input fields labeled 'Agency', 'Property', and 'Company', a 'Search' button, and a link to 'advanced search'. Below the search bar, there is a table with the following columns: Property Name, City, County, Agency, Units, PSR Bond, PSR Home, PSR RDA, CCPC Bond, CDLAC Bond, CDLAC P.Ben, and Status. The table contains four rows of property data.

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	Accepted	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

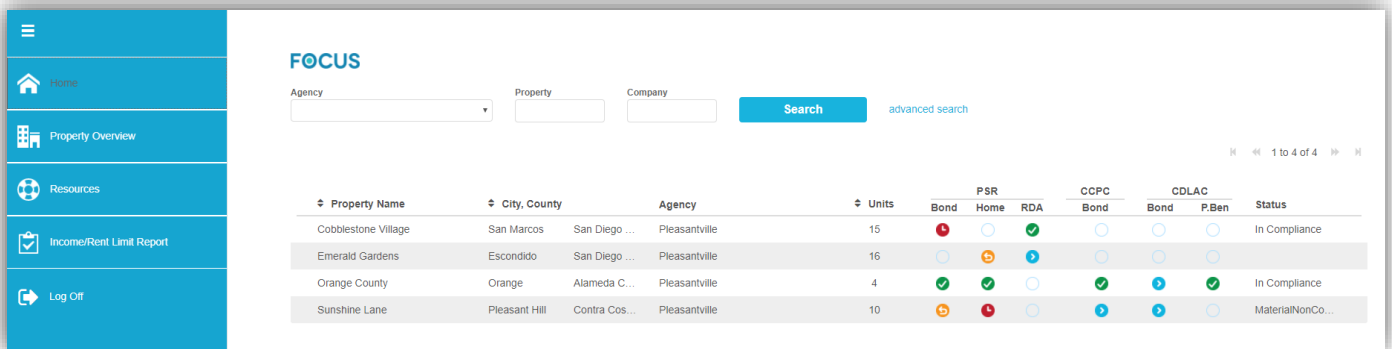
- Accepted
- Submitted
- Returned
- Due/Overdue

Left Hand Tool Bar

On the left hand tool bar you will see 5 options

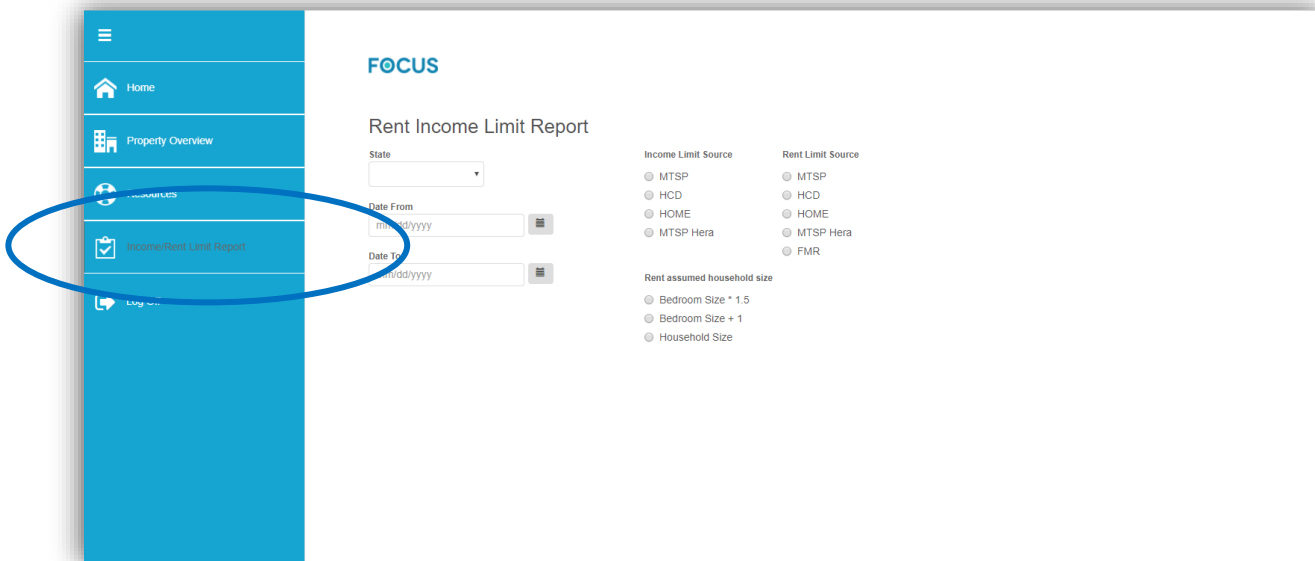
The options are as follows:

- 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)
- Log-Off



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 and Rent Limit Source, Rent Calculation/Assumed household 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

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.

 Compliant

Emerald Isle

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

Unit Building Name Tenant Name

Search Reset

Program	Restr	Bldg	Unit	Beds	Move-in	Tenants	Rent	Subsidy	Utility	Tenant Name	Curr Income	Recert.	Transfer Date	
RDA Home	60% 60%	425	1	2	1/18/2017	3	\$900	\$100	\$40	Jay Almond	\$60,000	1/18/2020	 3/1/2021	Action ▾
RDA	50%	425	11	3	5/1/2018	3	\$560	\$	\$35	Penny Holt	\$23,000	5/1/2020		Action ▾
RDA	50%	425	12	2	4/1/2018	4	\$700	\$300	\$45	Ben Forty	\$39,000	4/1/2020		Action ▾
RDA Home	50% 60%	425	15	3	12/15/2019	2	\$680	\$100	\$35	Becky Tea	\$7,900	12/15/2019		Action ▾
		425	2	1						Vacant			5/1/2021	Action ▾
RDA	60%	425	4	1	5/5/2020	3	\$450	\$0	\$0	Cate Moon	\$7,600	5/5/2020		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”.

Set Aside 1 to 8 of 8

Tenants	Rent	Subsidy	Utility	Tenant Name	Curr Income	Recert.	Transfer Date	
3	\$900	\$100	\$40	Jay Almond	\$60,000	1/18/2020	5/1/2021	Action
3	\$560	\$	\$35	Penny Holt	\$23,000	5/1/2020		Action Transfer Tenant Add New Event Action
4	\$700	\$300	\$45	Ben Forty	\$39,000	4/1/2020		

Then you will be taken to a pop-up box, which will provide the drop down of the Event Type:

- **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. For recertifications, you can 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 and then click on the “>” to see the complete unit history
- 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.

FOCUS

Welcome, danctolmgr

Home / Agency: Pleasantville / Property: Emerald Isle / Unit Details

Compliant

Unit 2

Bedrooms	Program Name	Tenant Income Restr.	Edit Unit
1	RDA Home	60% 50/0	


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

Tasks Tab

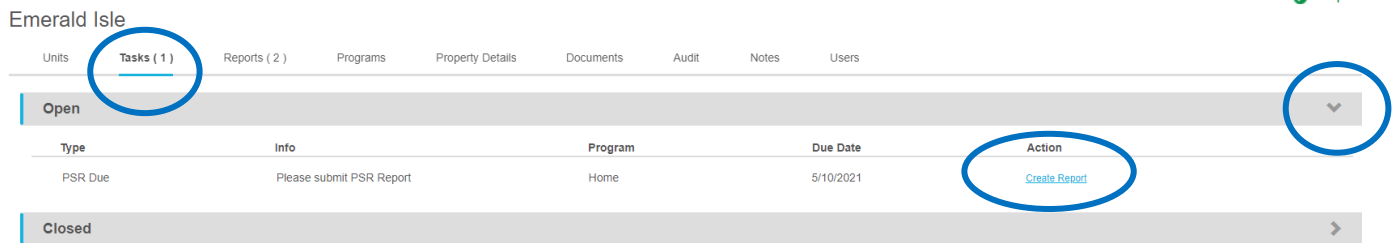
The **Tasks** tab enables Property Managers to view open and closed Tasks and submit reports.

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

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

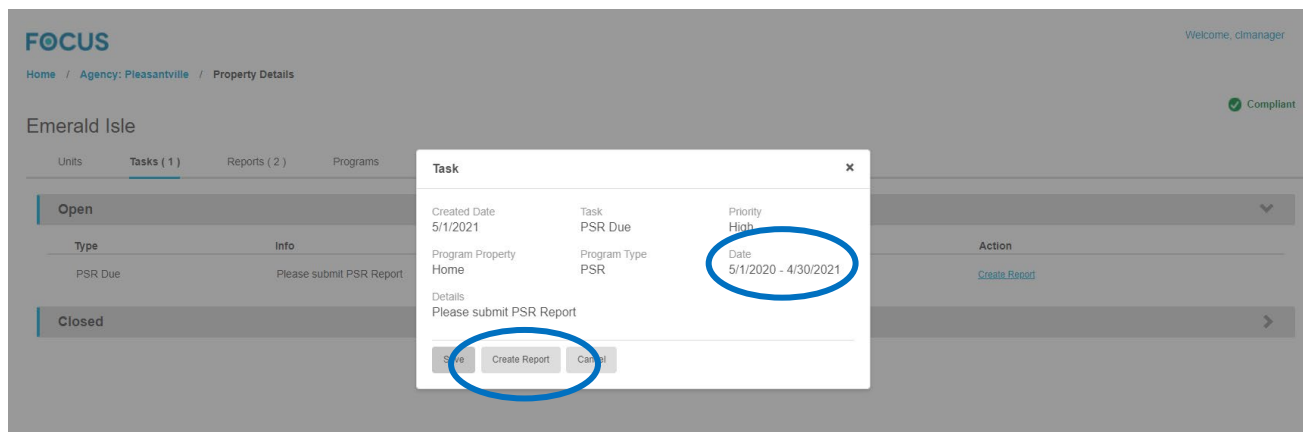
 If you have open tasks for a property, you will see a circled number on the tab next to the word Tasks. This indicates the number of open Tasks for the property.

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.

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
- 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	7	2	\$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	

6. As soon as you are satisfied with the report, click the blue Submit PSR button. 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 enables users to see the regulatory restrictions for each program being monitored for each property.

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 Last Recertification	Unit Re-certification Required Months
12	12		12
Initial Audit Period	Continual Audit Period	Override Total Units	
		12	
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 for 'Sunshine Lane' under the 'Agency: Pleasantville' section. The breadcrumb trail is 'Home / Agency: Pleasantville / Property Details'. A red notification icon indicates 'Material Non-Compliant'. The navigation menu includes 'Units', 'Tasks (3)', 'Reports (2)', 'Programs', 'Property Details', 'Documents' (active), 'Audit', 'Notes', and 'Users'. Below the navigation, there are search and filter options: 'Name' and 'Type' input fields, 'Search', and 'Reset' buttons. There are also 'New' and 'Download' buttons. A table lists three documents:

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

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

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

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 information is provided on each User:

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

The screenshot shows a web interface for the 'Emerald Isle' property. At the top, there is a breadcrumb trail: 'Home / Agency: Pleasantville / Property Details'. A 'Compliant' status indicator is visible in the top right corner. Below the breadcrumb, 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 are search filters for 'Role', 'Name', and 'E-mail Address', along with a 'Search' button. An 'Export to Excel' link is located below the search filters. A table displays the user list with columns for 'Full Name', 'Role', 'Position', 'User Name', 'E-mail Address', and 'Contact Number'. The table contains three rows of data.

Full Name	Role	Position	User Name	E-mail Address	Contact Number
catlin manager	PropertyManager	Property Manager	clanclotmgr		
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?

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

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