HDS NextGen System User Guide

Application Submission Instructions

NEW HAMPSHIRE HOUSING

June 26, 2023

Contacts

HDS software technical assistance:
Morgan Smith, Business Analyst, at msmith@nhhfa.org (603) 310-9204

All other questions:
Nathan Robinson, Director Multifamily Development and Finance at nrobinson@nhhfa.org (603) 310-9366
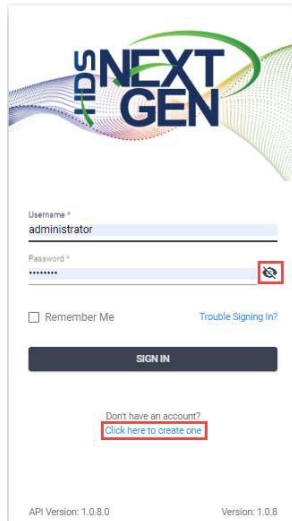
Table of Contents

Preface

This HDS Next Gen System User Guide provides instructions for developers applying for funding from New Hampshire Housing's Multifamily funding programs in submitting their application through the HDS Next Gen application system. Applications to the following programs will be submitted via the HDS Next Gen System:

- 9% Low-Income Housing Tax Credits
- 4% Low-Income Housing Tax Credits, in combination with tax-exempt bond financing
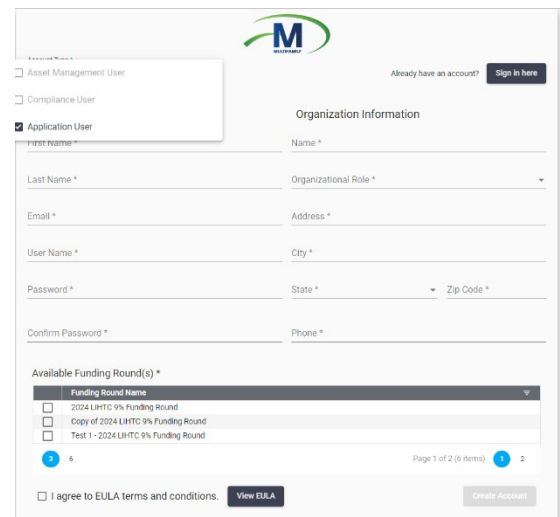- Multifamily Supportive Housing

Registration

To apply for a funding round, you must first register for an account in NH Housing's HDS Next Gen system.

To register, click this link to go to the Multifamily Web Portal login page and select HDS NextGen on the login screen.

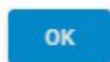Complete the required information on the registration form:
- Choose "Application User" in the pull-down field for "Account Type"
- Enter your Registrant and Organization Information
- Click the checkbox for the appropriate Funding Round under the Available Funding Round(s).
- Review the terms expressed in the End-User License Agreement (EULA) and select the checkbox to agree.
- Click "click here to create one" to Create Account.

You will receive a message indicating that you have completed your registration.

Create Account

You have requested access to Housing and Development Software Portal. Our agency will be reviewing your request and will be contacting you with your login information.

OK

Your registration must be reviewed and approved by NH Housing Staff.
After your account has been approved, you will receive an email notification to log into the system with the username and password you provided at registration.

Logging In

Once your registration has been approved, return to the login page to enter your user credentials. You must review and agree to the End-User License Agreement (EULA) before accessing the system for the first time, and each time the EULA is updated. Sign-in will become enabled after you select "I agree to EULA Terms and Conditions." Once selected, access to the HDS NextGen Multifamily Web Portal will be granted. The Remember Me checkbox is then visible, providing the option to log in without typing in user credentials.

If you have forgotten your username or password, click Trouble Signing In? and follow the prompts to retrieve your credentials. An email with your user ID or instructions for creating a new password will be sent to the email address you registered with. Click "Back to Sign In" to return to the previous page. If an option is not selected, you will receive an error message that states, "Select an option."
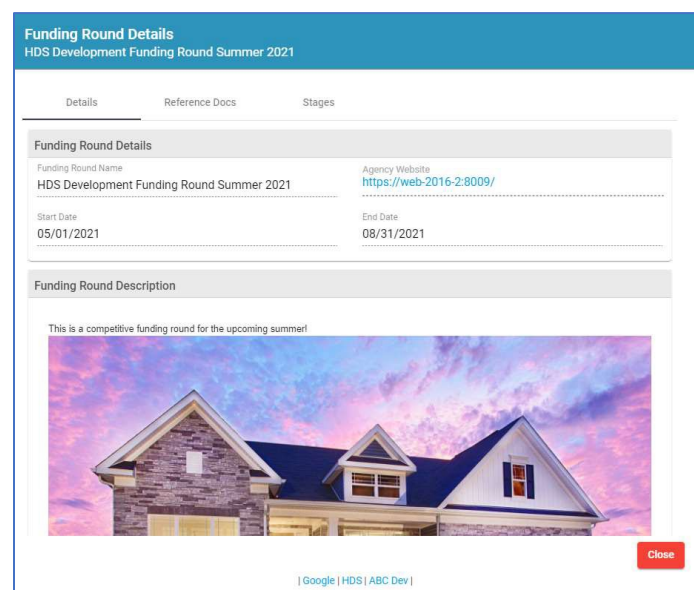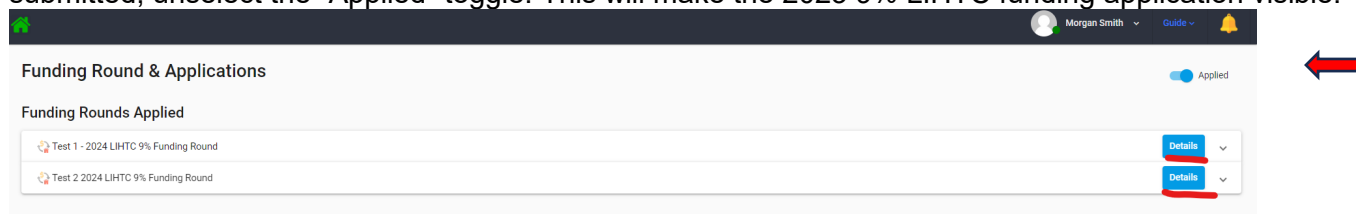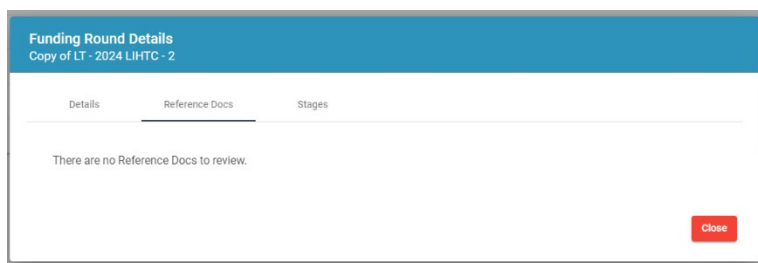
Funding Rounds and Applications

Home Screen

The Home screen shows a list of funding rounds linked to the user, along with additional information. By default, it shows Funding Rounds for which the applicant has submitted an application and the corresponding applied applications. If an applicant has not submitted an application through the HDS NextGen Multifamily Web Portal , no applications will be visible. To view funding rounds for which an application has not been submitted, unselect the "Applied" toggle. This will make the 2023 9% LIHTC funding application visible.

To access information about the Funding Rounds, simply click on the "Details" option. The Details tab provides essential details about the Funding Round, including its name, start and end dates, and any additional information.
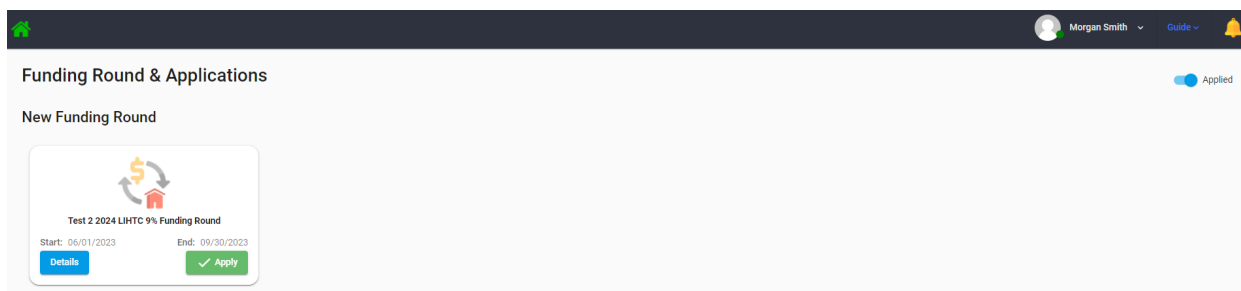

The reference docs tab contains documents related to the funding round which the agency had deemed important for the user to review and have access to.
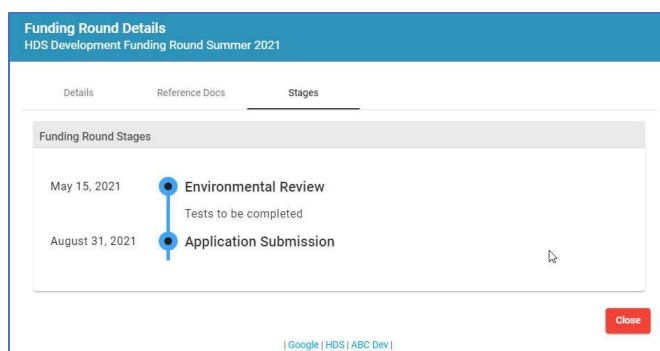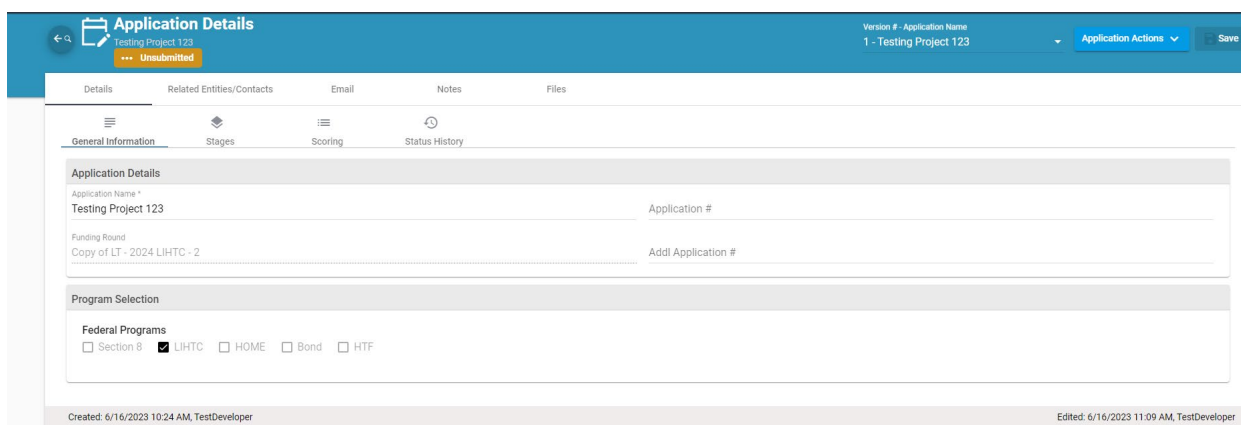
The stages tab provides a quick view of the funding round stages and the timeline.
Click close to exit the screen and return to the **Funding Rounds & Applications** home screen.

Starting Your Application

1. Click on the name of the funding round. This will expand the grid view and display and allow you to apply to the funding round.
2. Click anywhere on the application details box to access the record.

This will bring you to the application details screen.

Note: Please see **APPENDIX A** for instructions on how to add a collaborator.

Entering An Application

There are three main tabs that must be completed prior to submission of your application.

- General Information
- Stages
- Scoring

General Information tab:

Enter the following information on this tab.
1. Enter the project name in the Application Name field.
2. Click "Save" at the top right to save the name.

Stages tab:

The Stages Tab is where you will upload documents and the project application for review.

There are two sections:

- Application Upload - Where you upload the New Hampshire Housing Financing Application Excel file
- Exhibits – Where you will upload exhibit files

1. Click on Files to the right of each section - A new window will be displayed listing the files that can be uploaded.
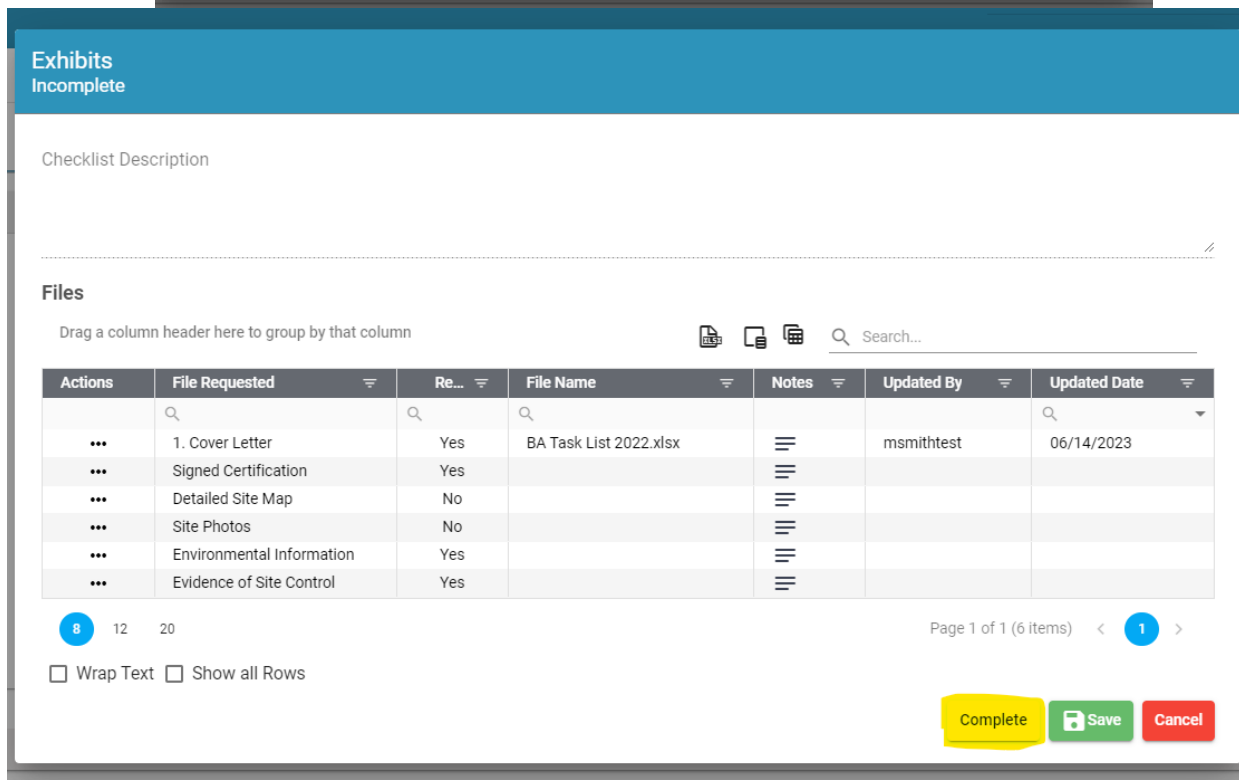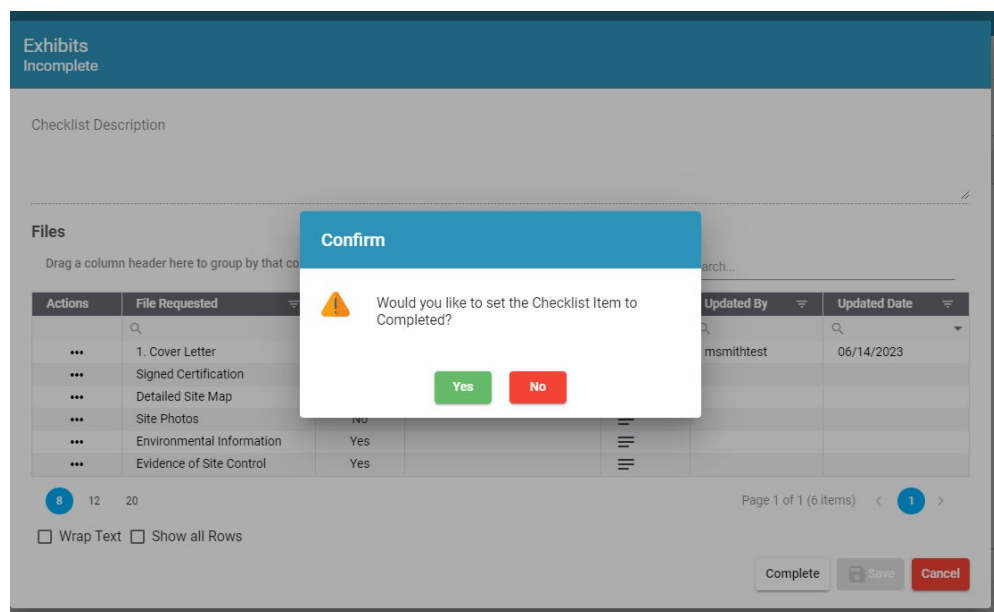

Note: The "Required" documents for the round are marked "Yes" in the Required column to the right of the File Requested column.

To upload a document, click on the three dots in the Actions column to the left of the document name and choose "Upload."

1. Click Browse to open the file explorer window on your computer
2. Select File and click "Open" – This will upload the file into the system
3. Add any notes in the Note section of the window relative to that document
4. Click Save.

You will see the File Name, Update by and Updated Date in the grid.

- You can click "Save" at any time and come back to this area to upload more documents.
- After successfully uploading all the files that you would like to have reviewed for the funding round, please click the "Complete" button.
- The system will ask for confirmation that all items in the **Checklist** are complete. Click "Yes" if the statement is true and "No" if you would like to continue uploading documents.

- Click save.

Exhibits
Completed

Checklist Description

Files

Drag a column header here to group by that column

Actions	File Requested	Re...	File Name	Notes	Updated By	Updated Date
•••	1. Cover Letter	Yes	BA Task List 2022	≡	msmithtest	06/14/2023
•••	Signed Certification	Yes		≡		
•••	Detailed Site Map	No		≡		
•••	Site Photos	No		≡		
•••	Environmental Information	Yes		≡		
•••	Evidence of Site Control	Yes		≡		

8 12 20   Page 1 of 1 (6 items) ‹ 1 ›

☐ Wrap Text   ☐ Show all Rows

Mark as Incomplete   💾 Save   Cancel

Once you have completed both sections of the Stage you can mark the Stage as "Complete." *Please ensure that you have uploaded all the required documents.*

Once this stage is marked as complete, it cannot be reopened, and you will not be able to upload any additional documents to the application. NH Housing staff CANNOT reopen this area of the application.

Scoring tab

Within the **Scoring** tab, please proceed down the column and input your self-score for each item. Additionally, if applicable, you can add any relevant notes in the designated section.

Once you have completed the self-scoring of your application click **"Save"** in the upper right corner of the window to save your application.

Once all information is entered click on the save button in the upper right-hand corner of application details.

Submitting Application for Review

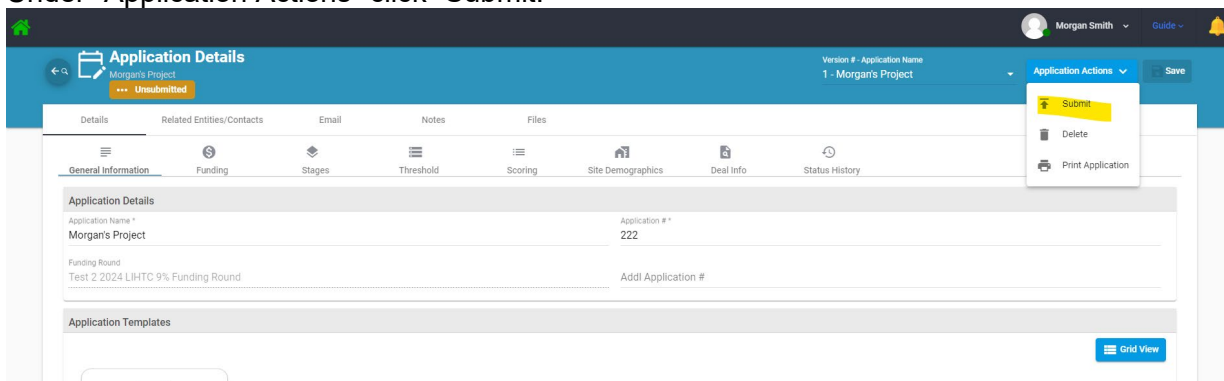Once you have completed all three tabs (General Information, Stages, Scoring) Click "Save" your application.

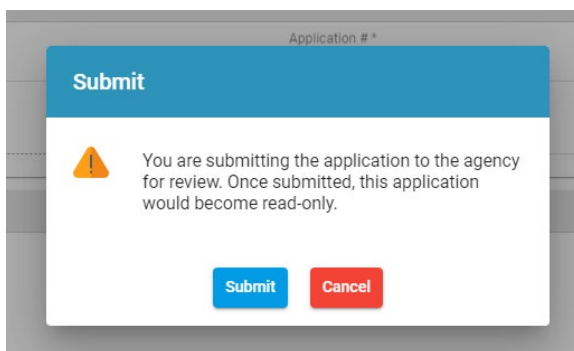You are now ready to submit your application for review.

WARNING!!!
Please exercise caution and refrain from clicking the submit button until you are certain that your application is complete.
Once the application is submitted, you will not have the ability to make any further edits or modifications.
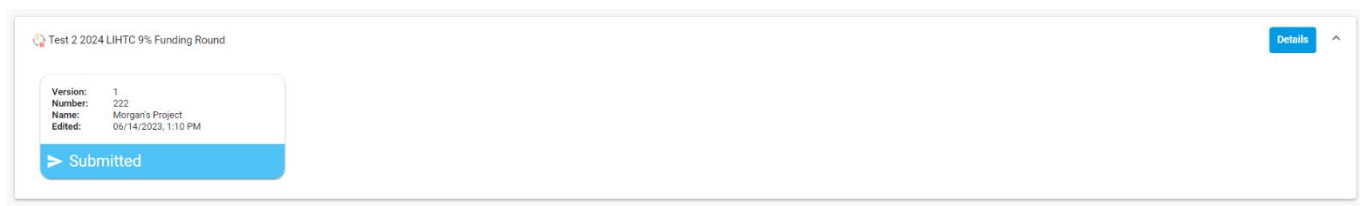

Under "Application Actions" click "Submit."

The following message will appear. Click submit again.

The status of the application will appear in the funding round as "Submitted."

APPENDIX A

Adding a Collaborator

If you wish to include an additional person(s) in the collaboration of your application, you can add them to the system and grant them access to the application. The collaborator will only be able to access the applications that have been specifically assigned to them.

1. Click on the Related Entities/Contacts tab.

2. Click on +Collaborator

3. Click on +Contact

4. Click on the

5. Add contact information

6. Click Save.

7. Check the box next to the contact's name and then click on save.

8. Click on save again.

9. You will receive a message that the contact record was added successfully.