



IOWA FINANCE
AUTHORITY

CERTIFICATION ONLINE

A HOW-TO GUIDE TO UPLOADING DOCUMENTS & FILES

January, 2016

Forward

The Iowa Finance Authority (IFA) was established in 1975 to undertake programs to assist in the production of housing for low- and moderate-income residents in the state of Iowa. This manual addresses the reporting requirements for two of those programs, the Low Income Housing Tax Credit (LIHTC) and the HOME programs.

IFA has used a product called CERTIFICATION ONLINE (COL) from software developer Emphasys for many years. We are excited to roll out this new module that interfaces with COL which will allow the property management companies to upload their tenant, project & annual reporting documents directly into COL. Several of our partners have been using this module for months and are pleased with its functionality and ease of use.

We have produced this manual on the use of the COL document management portal to assist you with learning how to upload your documents. This will save countless hours and hopefully alleviate the frustration of trying to email or fax your documents into us.

We are hopeful this guide will be of assistance and aid you with training new staff that will have the responsibility of managing the documents for your project. Please remember that any user wishing to use the document portal will need to have a login assigned to them by the property management company's administrator.

Iowa Finance Authority Contact Information

Phone: (515) 725-4900

Toll-Free: 1-(800)-432-7230 Fax: (515) 725-4901

IFA Main Website: www.iowafinanceauthority.gov

LIHTC and HOME Compliance webpage: <http://www.iowafinanceauthority.gov/Home/DocumentSubCategory/7>

Guide to Upload Documents and Files into Certification Online

Iowa Finance Authority
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Log in and select the project you will be uploading files for.

The screenshot shows the 'Certification On Line' web application interface. At the top, there is a navigation bar with the Iowa Finance Authority logo and several utility icons. Below the navigation bar, a welcome message reads 'Welcome, NO MANAGER!' and the date 'Thursday, January 5, 2017' is displayed. The main content area is titled 'Projects' and contains a table with the following data:

Project Select	Project ID Number	Development Name	Development Address	Annual Owner Certs Status	Last Annual Submission Date
<input checked="" type="radio"/>	87-10	test	test	NOT SUBMITTED	09/02/15
<input type="radio"/>	96-50	Riverview Apts	2236 Loomis Ave	NOT SUBMITTED	03/19/15

Below the table, it states 'Total Number of Projects: 2'. Navigation buttons for 'Import All Building Data', 'Upload Files', 'Annual Owner Certs', and 'Proceed to Buildings' are visible at the top right of the table area.

Upload Files

Click on:

This image is a close-up of the navigation bar from the screenshot above. It shows the 'Projects' label on the left, followed by a page indicator '[Page 1 of 2]'. The 'Upload Files' button is highlighted in the center, with other buttons for 'Import All Building Data', 'Annual Owner Certs', and 'Proceed to Buildings' visible to its right.

The screenshot shows the 'Project Documents/Files' section of the web application. At the top, there are input fields for 'Project ID: 87-10', 'test', and 'test'. Below this, the section is titled 'Project Documents/Files' and contains four sub-sections, each with a table and a 'Submit' button:

- Financial Audit**: Table with columns: Select, Document Name, Original File Name, Reporting Period, Uploaded By, Submit Status. Message: '*** No Documents/Files found for this category ***'
- Budget**: Table with columns: Select, Document Name, Original File Name, Reporting period, Uploaded By, Submit Status. Message: '*** No Documents/Files found for this category ***'
- Monthly Income & Expense (MIE)**: Table with columns: Select, Document Name, Original File Name, Reporting Period, Uploaded By, Submit Status. Message: '*** No Documents/Files found for this category ***'
- Miscellaneous**: Table with columns: Select, Document Name, Original File Name, Reporting Period, Uploaded By, Submit Status. Message: '*** No Documents/Files found for this category ***'

The address bar at the bottom shows 'https://iowafinanceauthority.iowa.gov/secure/col/HCOL100.html' and the system tray shows the time '9:14 AM 1/5/2017'.



Under the MISCELLANEOUS header – Click on



Enter File Name or Short Description*:

File names to use:

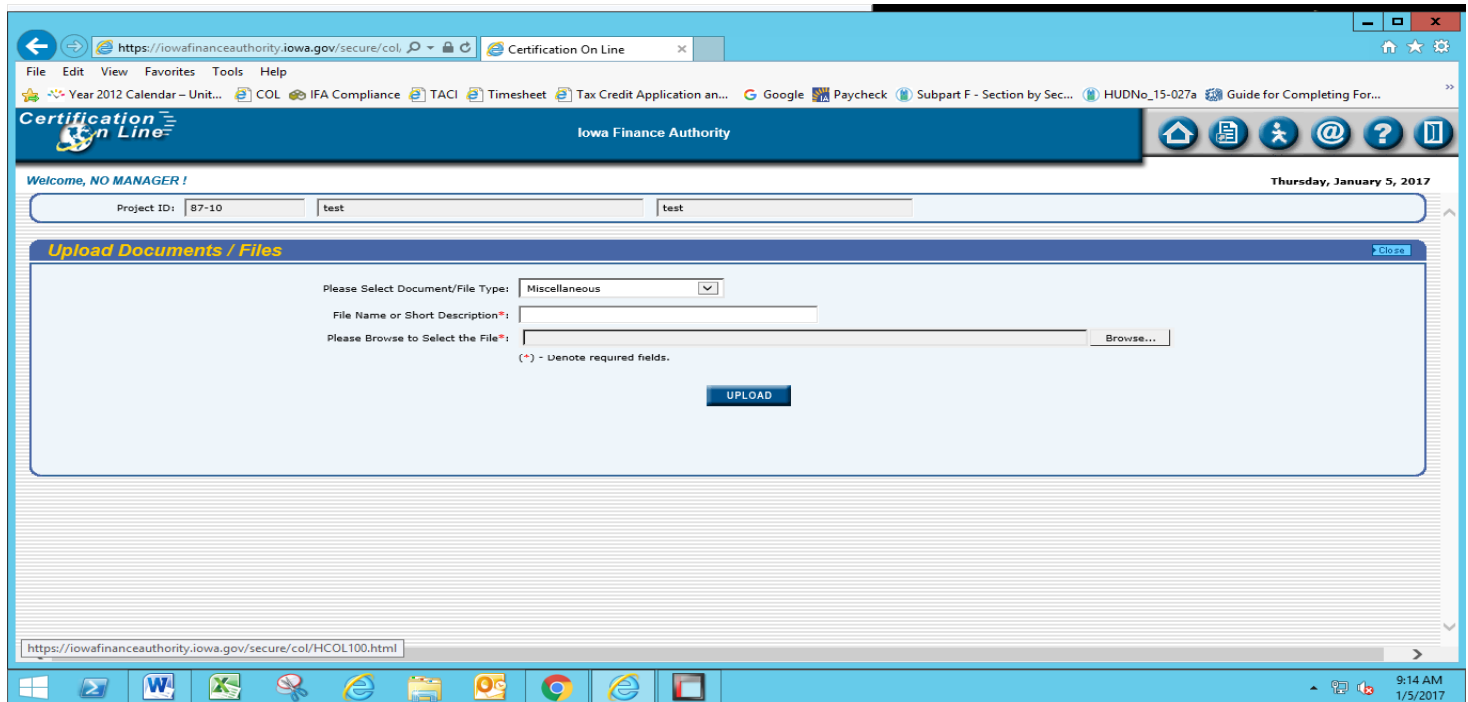
For Annual Reports: YEAR Annual Report Documents

For Inspections: YEAR Pre Inspection Documents

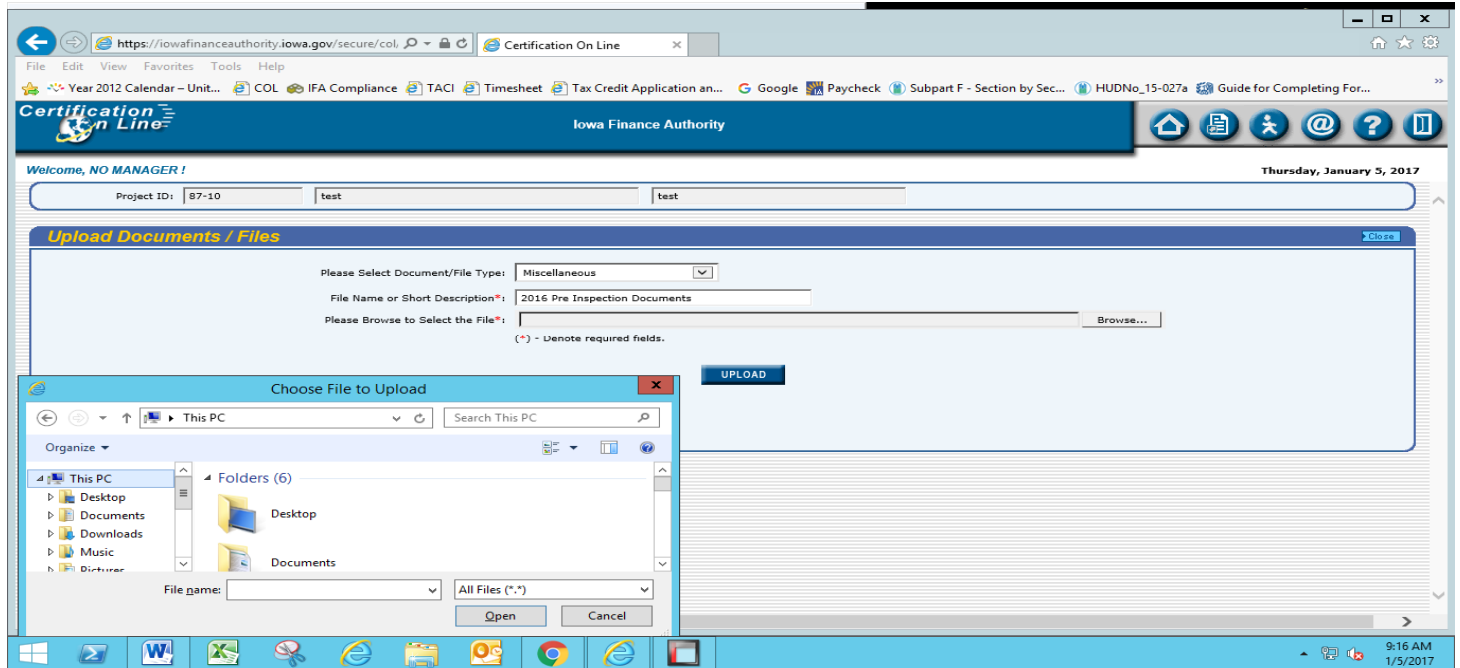
YEAR Tenant Files (If individual files also include Unit number. You can also ZIP the files by selecting the files you are sending and right click on any highlighted file > Send to > Compressed (Zipped) Folder)

YEAR Audit Response

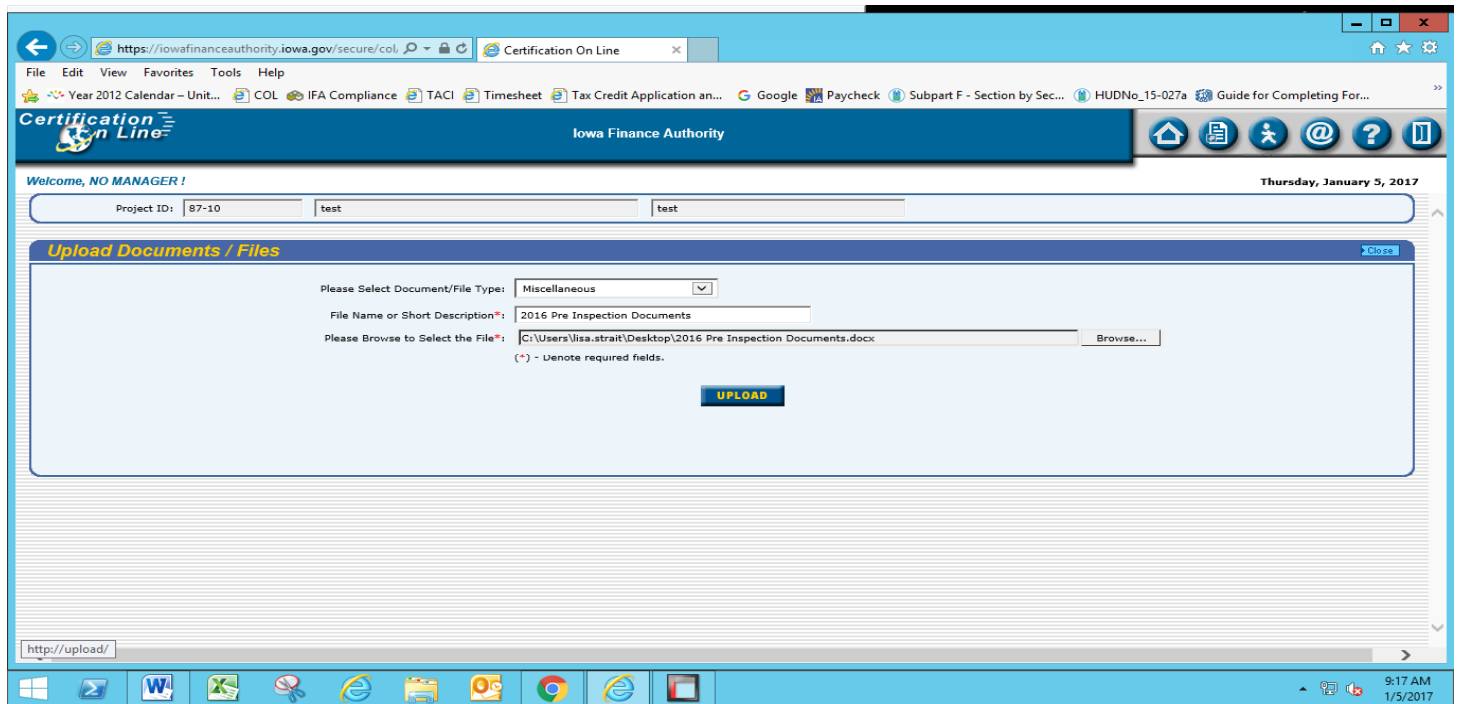
- ✓ When you complete your upload of documents, send an e-mail to your compliance officer stating you uploaded documents.



Click on **BROWSE** and Choose File to Upload:
(See instructions for single files and zip files)



Click on **UPLOAD**: 



Your documents/files will show up under the MISCELLANEOUS header as they are uploaded.

Miscellaneous						New	Delete	Close
Select	Document Name	Original File Name	Reporting Period	Uploaded By	Submit Status			
<input type="checkbox"/>	<u>2016 Pre Inspection Documents</u>	2016_Pre_Inspection_Documents.docx	N/A	NO MANAGER On 01/05/17 09:17:37	*** Not Applicable ***			
<input type="checkbox"/>	<u>2016 Inspection Response</u>	TEST_3.pdf	N/A	NO MANAGER On 01/05/17 09:26:41	*** Not Applicable ***			
<input type="checkbox"/>	<u>2016 Tenant Files</u>	Tenant_Files_2016.zip	N/A	NO MANAGER On 01/05/17 09:28:09	*** Not Applicable ***			