

**Instruction Manual For On-Line
Certification Reporting (COL)**

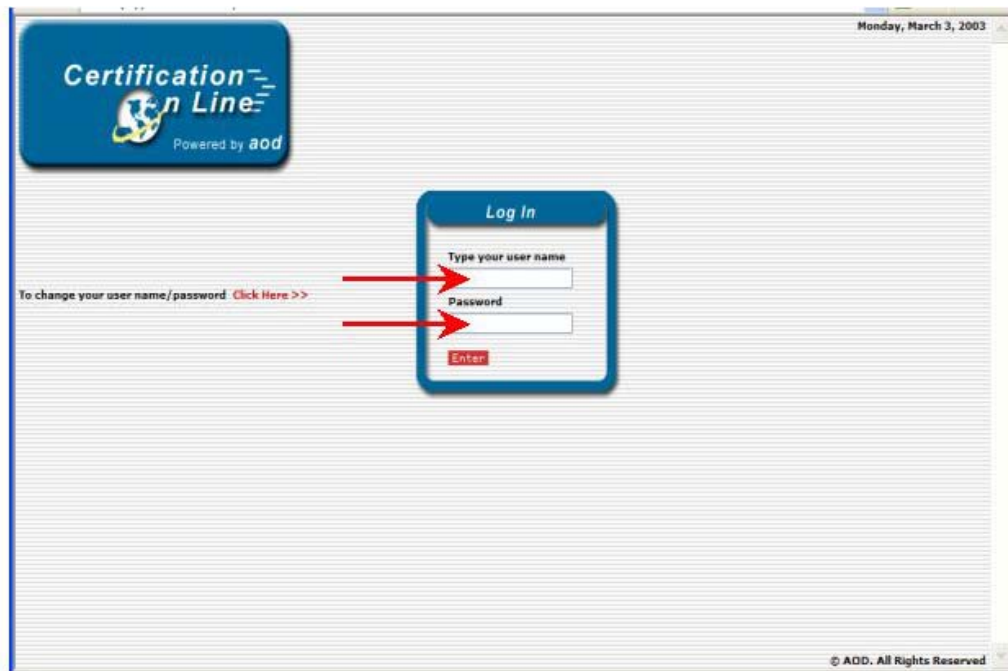


Management Company

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I. How do I log-in?




- ✚ Enter into the address box of your internet browser, the address that was provided by your Agency and click on the 'GO' button.
This is the first screen that you will see.

✚ **PLEASE NOTE: The first time you log-in the system, you will be taken to a second log-in screen. If this is your first time to log-in, please see the next page, 1A, for further information.**

- ✚ After entering the name and password, click on the red 'Enter' button or press 'Enter' on your PC keyboard.
- ✚ You are now logged into the Certification On-Line reporting system and will be taken to the list of Projects managed by your company.



- ✚ This menu bar appears above all of the screens within COL. Whenever you wish to exit the system, please use the 'Log Out' icon  on this menu bar.

I-A. First Log-In Is Different

The screenshot shows a web browser window with a blue header containing the 'Certification On-Line' logo and 'Powered by aod'. The main content area is a white box with a blue border containing a 'User Name/Password' form. The form has fields for 'User Name', 'New User Name', 'Password', 'New Password', and 'Confirm Password', each with a corresponding input box. A red 'Enter' button is at the bottom. Two red arrows point to the 'New User Name' and 'New Password' fields. A copyright notice '© AOD. All Rights Reserved' is in the bottom right corner.

- ✚ The first time you log in to the Certification On-Line reporting system, your User Name will be the company Taxpayer ID number, beginning with an 'F' for a company, or an 'S' for an individual Social Security number. For example, for ABC Management the User Name would be F000000102 and for Tom Smith, the User Name would be S222839411.
- ✚ The first time you log in to the Certification On-Line reporting system, your Password will be one that has been provided to you by your Agency.
- ✚ On this screen you will enter a new 'User Name' and a new 'Password'.
- ✚ **PLEASE NOTE: You will be taken to this screen on the first time *only* to allow you to establish codes known only to you. Once you choose a new 'User Name' and 'Password', the Agency will no longer know them so please write them down and protect them!**
- ✚ When you have entered the required information, click on the red 'Enter' key or press 'Enter' on you PC keyboard.

II. List of Projects

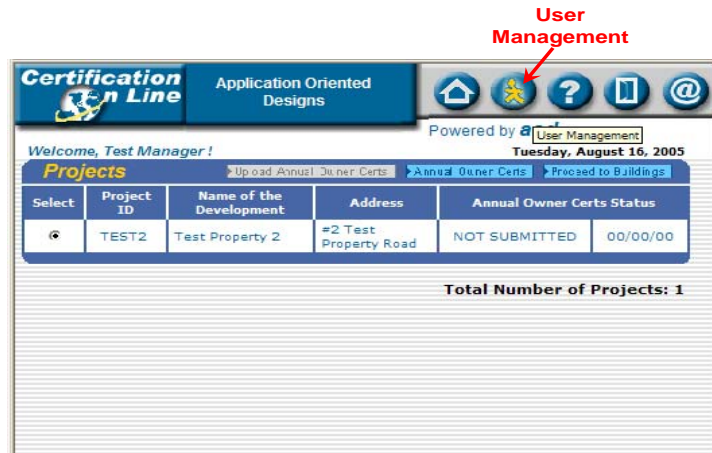
The screenshot shows the 'Certification n Line' web application interface. At the top, there is a navigation bar with icons for Home, User Set-up, Help, Log Out, and Contact Us. Below this is a header section with the text 'Application Oriented Designs' and 'Powered by aod'. The main content area is titled 'Projects' and contains a table with the following data:

Select	Project ID	Name of the Development	Address	Annual Owner Certs	Status
<input type="radio"/>	TEST2	Test Property 2	#2 Test Property Road	NOT SUBMITTED	00/00/00

Below the table, it says 'Total Number of Projects: 1'. Red arrows point to the 'Home' link, 'User Set-up' link, 'Help' link, 'Log Out' link, 'Contact Us' link, the 'Annual Owner Certs' button, and the 'Proceed to Bldgs' button.


- ✚ All of the properties that are managed by your company will be displayed here by the LIHTC Project ID number. Next to the ID number is displayed the name and address of the property.
- ✚ In the boxes next to the address is listed the status of the Annual Owner Certification for the current reporting period. Now it displays 'Not Submitted' and the date field shows 00/00/00. This will be updated when the Annual Owner Certification is processed.
- ✚ To choose the property to work with, place the cursor of your mouse on the circle next to the Project ID of the property and click.
- ✚ At the top right hand corner of the Projects box are two buttons:
 - Annual Owner Certs**; and
 - Proceed to Buildings**
- ✚ To access the Annual Owner Certification process, place the mouse cursor on the '**Annual Owner Certs**' button and click.

III. User Management

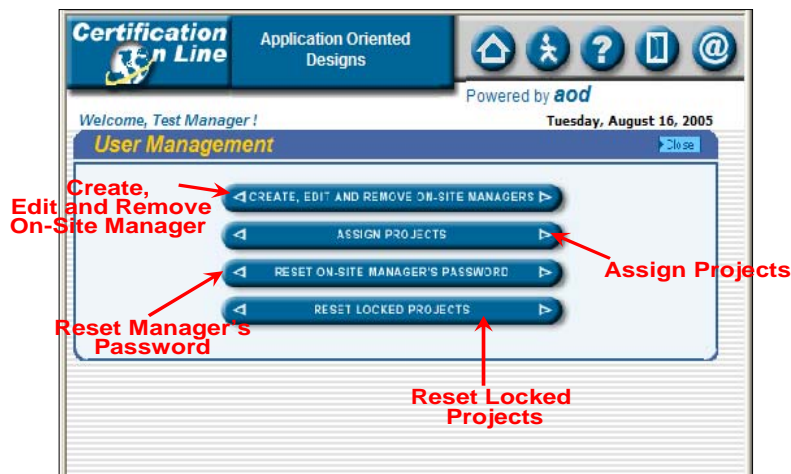


- The User Management Section gives the management company the ability to give their employees access to the Certification On-Line reporting system. Additional users can be created and deleted and one or more developments assigned to each additional user.
- To access the User Management Section go to the menu bar,



place the cursor of your mouse on the User Set-up button  and click.

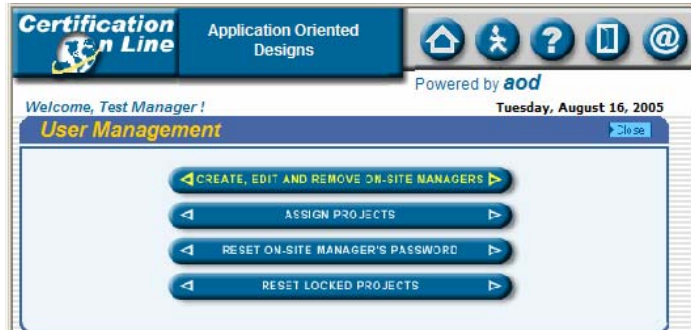
- This will take you to the User Management main menu.



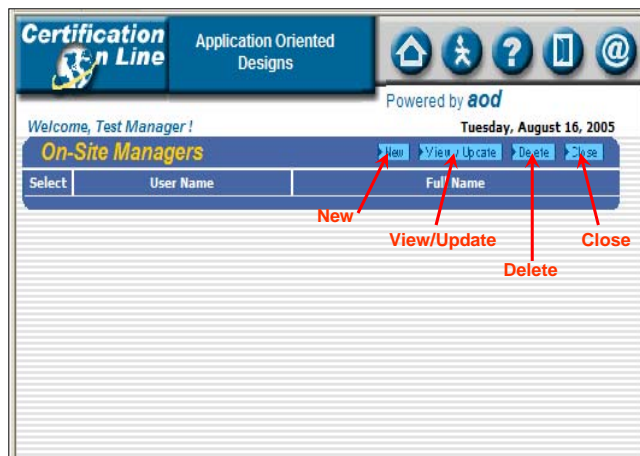
- The User Management main menu gives access to: (1) Create new users; (2) Assign projects to each user; (3) Reset the user password; and (4) Reset Locked Projects.

III-A. Add Authorized Users

- To add an authorized user, go to the User Management main menu. Place your mouse on the Create, Edit and Remove On-Site Managers bar and click.



- This will take you to the On-Site Managers main menu. Here you can begin the process to create, view/update, or delete additional authorized users.



- To add a new authorized user, place your mouse on the NEW key and click.

- This will take you to the On-Site Manager screen.



III-A. Add Authorized Users

(Continued)

- ✚ Place your mouse on the First Name box and click, enter the first name of the new user and hit the Tab key. This will take you to the Middle box. To leave this field blank, hit the Tab key. This will take you to the Last Name box. Enter the last name of the new authorized user and hit the Tab key. This will take you to the E-mail box. Enter the email address (if you have it) of the new authorized user and hit the Tab key.
- ✚ The next two fields are the User Name and Password. Each field must contain at least 6 characters.
- ✚ When this User logs in for the first time, they will be asked to choose a new User Name and Password. The User can choose to enter the same User Name and Password again.
- ✚ To save this information, place your mouse on the Update key and click. You will return to the On-Site Managers Main Menu.



- ✚ You should now see the name of the new authorized user on the On-Site Managers main menu.
- ✚ If you ever need to change any of the information for an authorized user, place your mouse on the Select box for the user and click. Then place your mouse on the View/Update box of the On-Site Managers main menu and click.
- ✚ This will take you to the authorized user information screen. Update the changed information and place your mouse on the Update box and click. You will return to the On-Site Managers Main Menu.

III-B. Assign Projects to Authorized User

- ✚ To add an authorized user, go to the User Management main menu. Place your mouse on the Assign Projects bar and click.



- ✚ This will take you to an On-Site Managers screen. On this screen you will see two sections; (1) On-Site Managers; and (2) Project Assignment.



- ✚ In the On-Site Managers section, there is a box that says “Please Select a User”.
- ✚ In the Project Assignment section is the list of properties that the management company is processing on-line.
- ✚ In the last column marked “Assigned To”. If a project has not been assigned to user, the column will show “Unassigned”.
- ✚ Place your mouse on the Select box (On-Site Managers Section) for the user you want to assign a project to and click.
- ✚ Place your mouse on the Assign box (Project Assignment Section) of the project that you want to assign (must show “Unassigned”) and click.
- ✚ When the User is highlighted and the Assigned box of the chosen project is marked, place your mouse on the Update button and click. Then move your mouse to the close button and click.

III-B. Assign Projects to Authorized User (Continued)

The screenshot shows the 'Certification On Line' application interface. The top navigation bar includes 'Application Oriented Designs' and 'Powered by aod'. The main content area is divided into two sections: 'On-Site Managers' and 'Project Assignment'. In the 'On-Site Managers' section, there is a dropdown menu for 'Name' with 'Mary Smith' selected, and an 'Update' button. In the 'Project Assignment' section, there is a table with one row of data. A red arrow points to the 'Update' button, and another red arrow points to the 'Assign' checkbox in the table.

Assign	Project ID	Name of the Development	Address	Assigned To
<input checked="" type="checkbox"/>	TEST2	Test Property 2	#2 Test Property Road	** UNASSIGNED **

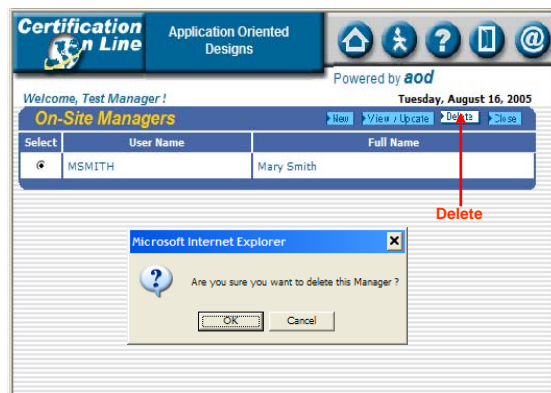
- ✚ This will take you back to the User Management main menu.
- ✚ The authorized user (in this case Mary Smith) now can access that project (Test2).

III-C. Remove Authorized Users

- ✚ Should you need to remove an authorized user, go to the User Management main menu. Place your mouse on the Create, Edit and Remove On-Site Managers bar and click.



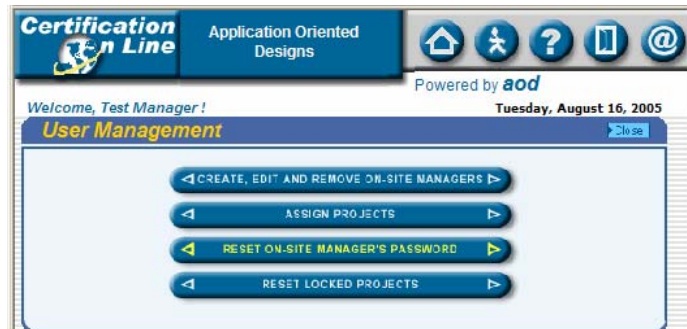
- ✚ This will take you to the On-Site Managers main menu.
- ✚ Place your mouse on the Select box for the user you want to delete and click.
- ✚ Place your mouse on the Delete button and click.



- ✚ A box will come up asking "Are you sure you want to delete this manager?"
- ✚ This will take you back to the On-Site Managers main menu. The user will no longer be displayed.

III-D. Reset Passwords

- ✚ Should you need to reset an authorized user's password, go to the User Management main menu. Place your mouse on the Reset On-Site Manager's Password bar and click.



- ✚ This will take you to the On-Site Managers screen where you will see a box that says "Please Select a User".



- ✚ Place your mouse on the down arrow of the box and look for the authorized user that you want to reset the password for. Highlight the user and click.

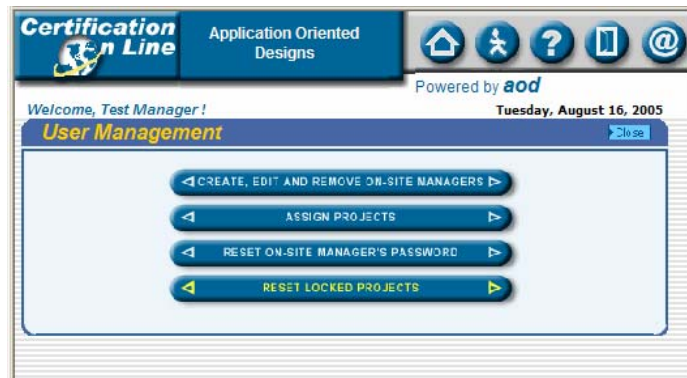


- ✚ Place your mouse on the Reset Password button and click. Then place your mouse on the Close button and click

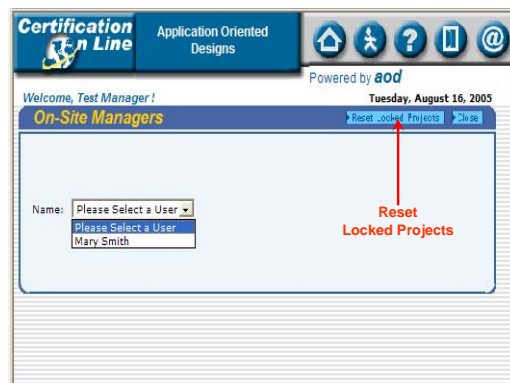
- ✚ This will take you back to the User Management main menu.

III-D. Reset Locked Projects

- ✦ The authorized user's User Name and Password is now reset to what was given originally. At next log-in, they will again need to create a new User Name and Password.
- ✦ A locked project is one that, for whatever reason, can no longer be accessed by the authorized user assigned to that project.
- ✦ Should you need to reset a locked project, go to the User Management main menu. Place your mouse on the Reset Locked Projects bar and click.



- ✦ This will take you to the On-Site Managers screen where you will see a box that says "Please Select a User".



- ✦ Place your mouse on the down arrow of the box and look for the authorized user that you want to reset projects for. Highlight the user and click
- ✦ Place your mouse on the Reset Locked Projects button and click. Then place your mouse on the Close button and click
- ✦ This will take you back to the User Management main menu.
- ✦ The projects of the authorized user are now reset and should be accessible.