



**Louisiana Housing**  
Corporation

**HOUSING MANAGEMENT SYSTEM (HMS)**








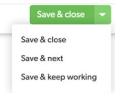

**USER GUIDE:  
HOUSING MANAGEMENT SYSTEM (HMS)  
CHDO CERTIFICATION**

Version 1.0 (8-18-22)

# 1. SETTING UP A USER ACCOUNT

LHC will set up your user account and associate it with your organization. You will receive an email invite from **notify@quickbase.com**. When you click the link inside the email, it will lead you to the sign-in page. You will be prompted to choose a username and a password. Create a username that does not contain any spaces and a strong password that you have not used before. You will be prompted to enter your credentials for future sessions.

# 2. BUTTONS and SYMBOLS: QUICK REFERENCE

Pencil		Click the pencil when you want to edit, add or remove field data.
Eye		Click the eye when you want to view the field data without editing.
Add Document		Click the page with plus sign to upload a document.
Add Contact		Click the person with plus sign to add a contact (board member, professional staff, development team member, etc.).
Remove Contact		Click the red person with the minus sign to remove the person from the list they appear in. This will not delete the contact, only remove it from the current list.
Generate Document		Click the page with the pen to generate a document.
Save & Close		Select this option when you are done editing and ready to close out the page you are currently editing.
Save & Keep Working		Select this option when you want to save your edits but are not ready to close the page you are working on.
Red Labels		If a field label is red it is a required field and has not yet been filled in.

# 3. ORGANIZATION DASHBOARD

Each organization will have its own dashboard. This home page will give you access to your organization's general information, messages, open certification requests, open program applications and all active projects.

In the upper left corner of your home page, you will see the "My Organizations" section. To access your organizations information, select the pencil next to your organizations name.

**LHC Housing Management System > Organization Home Page** Import/Export Print this page Customize this Page

**My Organization**

Organization Name	Physical Address	Primary Contact	Primary Contact Email	Primary Contact Phone
Team Civic Solutions	69090 Highway 190 Service Road, Covington,	Arthur Woodhouse	doubledeuce@teamcivicsolutions.org	(331) 456-7890

**My Messages**

Message Date/Time	Category	From	Subject	Status	Status Date	Aging
No Message records found						

**Open Certification Requests**

Certification ID	Organization	Certification Year	Request Opened: Date/Time	Request Submitted: Date/Time	Review Aging	Status
No Certification records found						

**Open Program Applications**

Application: ID	Project: Name	Project: Activity	Project: Construction Type	Date Opened	Date Submitted	Application: Aging	Project Analyst: Assigned
22-211083	Cansado Estates	Homebuyer	New Construction	05-22-2022 08:58 AM	05-18-2022 12:00 AM	54	

**Active Projects**

Application: ID	Project: Name	Project: Activity	Project: Construction Type	Date Opened	Date Submitted	Application: Aging	Project Analyst: Assigned
No Application records found							

HMS will open to your organization's summary page. This will also give you access to the following tabs:

- Basic Information
- Board Members
- Professional Staff
- All Contacts
- Portfolio
- Checklists
- Certifications
- Applications
- Documents
- Messages
- Calendar

**TEAM TITLE d/b/a TEAM CIVIC SOLUTIONS**

Team Title is not certified as a CHDO

**Summary** | Basic Information | Board Members | Professional Staff | All Contacts | Portfolio | Checklists | Certifications | Applications | Documents | Messages | Calendar

**ORGANIZATION DATA**

Physical Address: 69090 Highway 190 Service Road, Covington, Louisiana 70433  
Mailing Address: 69090 Highway 190 Service Road, Covington, Louisiana 70433

Primary Contact: Arthur Woodhouse Phone: (331) 456-7890 Email: doubledeuce@teamcivicsolutions.org  
Chief Executive Officer: Sterling Archer Phone: (985) 327-7227 Email: dutchess@teamcivicsolutions.org  
Board Chairperson: Lana Kane Phone: (504) 999-7777 Email: truckasaurus@teamcivicsolutions.org

Number of Board Members: 5  
Professional Staff: 2  
Current: All  
# of Contacts: 12

Number of Low Income Representatives: 3 60.00%  
Number of Public Sector Members: 0 0.00%

These tabs contain your organization's information such as name, entity type, contacts, project records and other data. You will utilize these tabs to add/update information throughout the year or before submitting a new certification or project application.

# 4. CERTIFICATION

Select the “Certifications” tab.

TEAM TITLE d/b/a TEAM CIVIC SOLUTIONS

Team Title is not certified as a CHDO

Summary Basic Information Board Members Professional Staff All Contacts Portfolio Checklists **Certifications** Applications Documents Messages Calendar

[CHDO Definition](#)

Choose Certification Type

CHDO

+ Add Certification Request

Full Report | Grid Edit | Email | More ▾ 1 Certification

	Certification ID	Organization	Submitted Date/Time	Aging	Aging
2022 (1 Certification)					
<input type="checkbox"/>	221074-CHDO	Team Civic Solutions	07-07-2022 12:00 AM		

Save & close Cancel

To begin a new certification, select the certification type from the drop-down menu under “Choose Certification Type” and then click the “**Add Certification Request**” button. If you wish to apply for Community Housing Development Organization set-aside funds and believe you meet the qualifications of a CHDO (see HOME CHDO Policy Guide), choose “CHDO.” Note that CHDO certification has very specific requirements; these can be found by clicking the link to the statute called “CHDO Definition” and referring to the *LHC CHDO Policies and Procedures*.

For an existing certification, select the pencil to the left of the existing certification to edit.

TEAM TITLE d/b/a TEAM CIVIC SOLUTIONS

Team Title is not certified as a CHDO

Summary Basic Information Board Members Professional Staff All Contacts Portfolio Checklists **Certifications** Applications Documents Messages Calendar

[CHDO Definition](#)

Choose Certification Type

CHDO

+ Add Certification Request

Full Report | Grid Edit | Email | More ▾ 1 Certification

	Certification ID	Organization	Submitted Date/Time	Aging	Aging
2022 (1 Certification)					
<input type="checkbox"/>	221074-CHDO	Team Civic Solutions	07-07-2022 12:00 AM		

Save & close Cancel

After clicking either the “Add Certification Request” button or your existing certification, you will have access to the following tabs:

- Legal Status
- Organization Structure
- Capacity & Experience
- Checklists
- Sign & Submit
- Messages
- Calendar
- Documents

The screenshot displays the HMS certification interface for 'Team Civic Solutions' (Certification ID: 22CHDO). At the top, there are fields for 'Certification Year' (2022), 'Certification Type' (Search and select), 'Certification Status Override', and 'Certification: Status: Override: Notes'. Below these is a horizontal tab bar with the following tabs: 'Legal Status', 'Organization Structure', 'Capacity & Experience', 'Checklists', 'Sign & Submit', 'Messages', 'Calendar', and 'Documents'. The 'Legal Status' tab is highlighted with a red oval. The main content area is divided into three sections: 'THRESHOLD QUALIFICATIONS' with questions 0 and 0a, 'ENTITY FORMATION' with question 1, and 'GOOD STANDING' with a 'Check Secretary of State Status' button and a status indicator.

The first three tabs, “**Legal Status**,” “**Organizational Structure**” and “**Capacity & Experience**” follow the language of the HOME Investment Partnership Program statute and represent the primary qualifications required of organizations seeking to use HOME funds for eligible activities. The following section describes the fields to be completed. NOTE: Many of the questions in HMS are contextual. Depending on your answers to some questions, others may or may not appear.

## A. Legal Status

### Threshold Qualifications

0. and 0a. Respond “Yes” or “No” to these initial questions.

### Entity Formation

1. Respond “Yes” or “No” to this question.

1a. Select the appropriate document type from the drop-down menu. If no changes were made since the last certification, your formation document from the prior year’s certification will appear at the bottom of that section and you will not need to upload another copy. If any changes were made to this document since the last certification you will need to upload the updated version by clicking the “Add...” button

The screenshot shows a web interface with a navigation bar at the top containing tabs: Legal Status, Organization Structure, Capacity & Experience, Checklists, Sign & Submit, Messages, Calendar, and Documents. The 'Legal Status' tab is active.

**THRESHOLD QUALIFICATIONS**

0. Is Team Civic Solutions currently registered as a federal contractor on SAM.gov?

0a. Is Team Civic Solutions or anyone employed by or representing Team Civic Solutions on the list of debarred federal contractors?

**ENTITY FORMATION**

1. Is Team Civic Solutions formed under Louisiana or local laws?

1a. Does Team Civic Solutions have Articles of Incorporation, a Charter, or Articles of Organization?

Please upload a complete and legible copy of your Articles of Incorporation.

**Add Articles of Incorporation for Team Civic Solutions**

Full Report | Grid Edit | Email | More ▾ 1 Document

<input type="checkbox"/>	Document Name	Tags	Submitted	Submitted By	Status	Status Date/Time	Link
<input type="checkbox"/>	Active (1 Document)						

### Good Standing

Click the “Check Secretary of State Status” button to contact Secretary of State for an up-to-date Good Standing status. This will fill in automatically once button is selected.

**GOOD STANDING**

**Check Secretary of State Status**

Status from LA Secretary of State    Status as of Date/Time

## **Governance**

2. Respond “Yes” or “No” to this question.

2a. Select the appropriate document type from the drop-down menu. If no changes were made since the last certification, your formation document from the prior year’s certification will appear at the bottom of that section and you will not need to upload another copy. If any changes were made to this document since the last certification you will need to upload the updated version by clicking the “Add...” button.

## **Profit Prohibition**

2b. Respond “Yes” or “No” to this question.

2c. Select the appropriate document type from the drop-down menu. If no changes were made since the last certification, your formation document from the prior year’s certification will appear at the bottom of that section and you will not need to upload another copy. If any changes were made to this document since the last certification you will need to upload the updated version by clicking the “Add...” button.

## **Affordable Housing Purpose**

2d. Respond “Yes” or “No” to this question.

2e. Select the appropriate document type from the drop-down menu. If no changes were made since the last certification, your formation document from the prior year’s certification will appear at the bottom of that section and you will not need to upload another copy. If any changes were made to this document since the last certification you will need to upload the updated version by clicking the “Add...” button.

## **Low Income Input Policy**

2f. Respond “Yes” or “No” to this question.

2g. Select the appropriate document type from the drop-down menu. If no changes were made since the last certification, your formation document from the prior year’s certification will appear at the bottom of that section and you will not need to upload another copy. If any changes were made to this document since the last certification you will need to upload the updated version by clicking the “Add...” button.

## **Non-Profit Designation**

3. Respond “Yes” or “No” to this question.

3a. Select the appropriate document type from the drop-down menu. If no changes were made since the last certification, your formation document from the prior year’s certification will appear at the bottom of that section and you will not need to upload another copy. If any changes were made to this document since the last certification you will need to upload the updated version by clicking the “Add...” button.

## **Service Area**

4. Select the specific geographic areas your organization serves from the drop-down menu.

## Financial Accountability

5. Respond “Yes” or “No” to this question.

6. If you need to create a Financial Accountability affidavit to be executed before uploading, select the option needed to generate affidavit (either to print blank affidavit or filled in).

6a. If you selected “Yes - Print Filled” type in the full name of the person that will sign the Financial Affidavit on behalf of your organization.

6b. If you selected “Yes - Print Filled” type in the person’s position/title with your organization.

Now click the “Generate Affidavit” button. The completed affidavit will appear in the “Blank Affidavit” field. Click the link to download a copy.

**FINANCIAL ACCOUNTABILITY**

5. Does Team Civic Solutions conform to the financial accountability standards of 24 CFR 84.21 / Attachment F of OMB Circular A-110, 'Standards for Financial Management Systems'?

Yes

6. Do you need to print a Financial Accountability Affidavit to bring to a notary?

Yes - Print Blank

**Generate Affidavit**

**Blank Affidavit**

Choose File no file selected

**Add Financial Accountability Affidavit**

**THIS DOCUMENT MUST BE UPDATED ANNUALLY AND MUST BE NOTARIZED**

Full Report | Grid Edit | Email | More ▾ 1 Document

	Document Name	Tags	Submitted	Submitted By	Status	Status Date/Time	Link
Active (1 Document)							
	Financial Accountability Affidavit Certification; Financial Accountability		05-22-2022 08:18 AM	Campani, AJ	Active	05-22-2022 08:19 AM	TCS_Affidavit.pdf

The generated document to be notarized will look like this:

\*Select Save and Close at the bottom of the page or in the upper right-hand side of page.

**Louisiana Housing Corporation**

**AFFIDAVIT**

BEFORE ME, notary, came and personally appeared:

Janae Dine  
Name  
CEO  
Title

a person of the full age of majority and possessing the requisite capacity, who avers:

Team Civic Solutions's management systems conform to the financial management standards set forth in 24 C.F.R. 84.21 by providing for and incorporating the following:

- Accurate current and complete disclosure of the financial results of each federally sponsored project, records which identify the source an application of funds for federally sponsored projects. These records contain information pertaining to federal awards, authorizations, obligations, and obligated balances, assets, at least, income and interest;
- Control over and accountability for all funds, property and other assets, adequate safeguards of all such as that she'll be adapted to ensure that all assets are used solely for authorize purposes;
- Comparison of outlays with budget amounts for each award;
- Written procedures to minimize the time lapse in between the receipt of funds and issuance or redemption of checks for program purposes by the recipient;
- Written procedures for determining the reasonableness, allocability and allowability of costs in accordance with the provisions of federal cost principles (Circular A-122) and the terms and conditions of the award; and
- The county records, including cost accounting records, that are supported by source documentation.

SWORN TO AND SUBSCRIBED before me, notary, in the Parish of \_\_\_\_\_, on the \_\_\_\_ day of \_\_\_\_\_

Janae Dine, CEO  
Team Civic Solutions

NOTARY

2022 Team Civic Solutions Application for Designation



## B. Organization Structure

### Board of Directors

1. Select the number of board members your organization has from the drop-down menu. There must be a minimum of 6 members. If you have less than 6 members a warning will appear above the drop-down menu “You Must Have At Least (6) Board Members.”

**BOARD OF DIRECTORS**

# of Board Members: 5      Percentage of Members Qualifying as Low Income Representatives: 60%      Percentage of Members Determined to be in Public Sector: 0%

1. How many people currently serve on the Board of Directors for Team Civic Solutions?  
**YOU MUST HAVE AT LEAST SIX (6) BOARD MEMBERS**

5

1a. Please review the board members for Team Civic Solutions below and update current board members, remove any that are no longer serving on the board, and add any newly appointed board members.

[Add Board Member](#)

Full Report | Grid Edit | Email | More ▾ 5 Contact Assignment records

	Year	Name	Roles	Mobile Phone	Alternate Phone	Email	Low Income Representative	Public Sector	Board Term		
<input type="checkbox"/>	2022	Sterling Archer	Board Member	(985) 327-7227		dutchess@teamcivicsolutions.org	✓		07-01-2021 - 06-30-2022		
<input type="checkbox"/>	2022	Len Drexler, III	Board Member	(504) 907-4435							
<input type="checkbox"/>	2022	Barry Dylan	Board Member								
<input type="checkbox"/>	2022	Lana Kane	Board Chairperson	(504) 999-7777		truckasaurus@teamcivicsolutions.org	✓		01-01-2020 - 12-31-2022		
<input type="checkbox"/>	2022	Pam Puvier	Board Member	(504) 999-9890		Bonjoviforlife@gmail.com	✓		06-01-2021 - 06-30-2022		

The number of board members selected must match the number of board member records entered; if the two numbers do not match, for instance, of you selected 6 board members but only added five board members, a warning will appear to let you know these numbers must match.

**BOARD OF DIRECTORS**

# of Board Members: 5      Percentage of Members Qualifying as Low Income Representatives: 60%      Percentage of Members Determined to be in Public Sector: 0%

1. How many people currently serve on the Board of Directors for Team Civic Solutions?  
**YOU MUST ADD 1 ADDITIONAL BOARD MEMBER RECORDS**

6

1a. Please review the board members for Team Civic Solutions below and update current board members, remove any that are no longer serving on the board, and add any newly appointed board members.

[Add Board Member](#)

Full Report | Grid Edit | Email | More ▾ 5 Contact Assignment records

	Year	Name	Roles	Mobile Phone	Alternate Phone	Email	Low Income Representative	Public Sector	Board Term		
<input type="checkbox"/>	2022	Sterling Archer	Board Member	(985) 327-7227		dutchess@teamcivicsolutions.org	✓		07-01-2021 - 06-30-2022		
<input type="checkbox"/>	2022	Len Drexler, III	Board Member	(504) 907-4435							
<input type="checkbox"/>	2022	Barry Dylan	Board Member								

### Add a New Board Member

To add a board member, select the “Add Board Member” button. A new window will appear. Complete all the required fields under the following tabs: Contact, Certification and Projects.

**STERLING ARCHER**  
 Team Civic Solutions  
 1200 Main Street, Carencro, Louisiana 70507

**Contact** Certification Projects Checklists History Documents

---

**NAME**

Name: First Name: Middle (Optional) Name: Last Suffix (Optional)

Sterling Archer

---

**ROLES**

1. Is Sterling Archer a member of the Board of Directors of Team Civic Solutions?

Yes

Board Position(s)

Board Member

Select up to 20 choices

2. Is Sterling Archer a paid professional staff member or paid consultant of Team Civic Solutions?

No

3. Is Sterling Archer part of Team Civic Solutions's external project development team (lender, architect, attorney, etc.)?

No

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**CONTACT INFORMATION**

Daytime/Mobile Phone Alternate Phone (Optional) Primary Email Alternate Email (Optional)

(985) 327-7227 ext. dutchess@teamcivicsolutions.org

Under the Contact tab, complete all required fields:

### Roles

1. Respond "Yes" to this question and then select the board position from the drop-down menu that appears.

### Contact Information, Physical & Mailing Address

Fill in all personal information such as address, phone number, etc. Note: This email address will be used for required certifications via e-signature from Board members, so please be sure an accurate, distinct and current email address is entered for each.

Under the Certification tab, complete all required fields:

### Board Term Start and End

Enter the board term start and end dates. Pursuant to the Louisiana Non-Profit Corporations Act, board terms may not exceed a five-year period.

### Certification of Low-Income Representation

This information is relied upon by LHC to determine whether your organization has sufficient input and representation from low-income community members. Please read these questions carefully and answer fully.

1. Respond "Yes" or "No" to this question. If yes, complete questions 1a, 1b and 1c.
2. Respond "Yes" or "No" to this question. If yes, complete question 2a.

3. Respond “Yes” or “No” to this question.  
If yes, complete questions 3a and 3b.

4. Respond “Yes” or “No” to this question.

4a and 4b. Type in your place of employment and title.  
If retired or unemployed, please state so.

5. Respond “Yes” or “No” to this question.  
If yes, complete question 5a.

Under the Projects tab, select the “Add Projects” button to add projects that support the individual’s affordable housing experience. A new window will open; please complete all relevant fields.

You will also find a Checklists tab that contains checklist items for every required field. This list will fill in automatically as you complete required fields and it will show 100% completed once you’ve answered every required question.

### Update an Existing Board Member

To update an existing board member profile, select the “Update” button on the far right side where it appears next to the board member you want to update.

To remove someone that is no longer a board member, click the “Remove from Board” button. This will not delete the contact; it only removes it from the current list of board members.

The screenshot displays the 'BOARD OF DIRECTORS' management interface. At the top, it shows summary statistics: '# of Board Members' (5), 'Percentage of Members Qualifying as Low Income Representatives' (60%), and 'Percentage of Members Determined to be in Public Sector' (0%). A question asks '1. How many people currently serve on the Board of Directors for Team Civic Solutions?' with a dropdown menu set to '5'. A red warning banner states 'YOU MUST HAVE AT LEAST SIX (6) BOARD MEMBERS'. Below this is an 'Add Board Member' button and a table of current board members. The table has columns for Year, Name, Roles, Mobile Phone, Alternate Phone, Email, Low Income Representative, Public Sector, and Board Term. Each row includes 'Update' and 'Remove from Board' buttons. Two red arrows point to these buttons in the first row.

Year	Name	Roles	Mobile Phone	Alternate Phone	Email	Low Income Representative	Public Sector	Board Term	Update	Remove from Board
2022	Sterling Archer	Board Member	(985) 327-7227		dutchess@teamcivicsolutions.org	✓		07-01-2021 - 06-30-2022	Update	Remove from Board
2022	Len Drexler, III	Board Member	(504) 907-4435						Update	Remove from Board
2022	Barry Dylan	Board Member							Update	Remove from Board

## Organization Chart

Click the “Add Organization Chart” button to upload a current organizational chart. A new window will open. Select “choose file” to select the document from your computer or you can drag and drop the file from your computer onto the “choose file” button.

Organization: [Team Civic Solutions](#) Certification: [221074-CHDO](#)

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**ORGANIZATIONAL CHART FOR TEAM CIVIC SOLUTIONS**

Document Verification Approval Closing Messages

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**DETAILS**

Document: Name Search Tags (Optional)

Organizational Chart for Team Civic Solutions

Drag/Upload Document Here

Choose File no file selected

Notes (Optional)

## For-Profit Sponsor

3. Respond “Yes” or “No” to this question. If yes, complete questions 3a, 3b, 3c and 3d.

## C. Capacity & Experience

### Professional Staff

1. Respond “Yes” or “No” to this question. If yes, you will be asked to review and update the list of current staff members or add new staff members.

### Add a Staff Member

To add a professional staff member, click the “Add Staff Member” button. A new window will appear. Complete all the required fields under the following tabs: Contact, Employment, Ownership Development and Projects.

Under the Contact tab, complete all required fields:

### Roles

2. Respond “Yes” to this question and then select the staff position from the drop-down menu that appears. If the contact is a paid consultant select “Consultant” as the staff position.

### Contact Information, Physical & Mailing Address

Fill in all personal information such as address, phone number, etc. Note: Email address is a required field and is necessary for the organization to use DocuSign to file its Certification.

Under the Employment tab, complete all required fields:

The screenshot shows a web form for 'STERLING ARCHER' at 'Team Civic Solutions'. The organization's address is '1200 Main Street, Carencro, Louisiana 70507'. The 'Contact' tab is selected, showing a navigation bar with other tabs: Certification, Employment, Ownership, Development, Projects, Checklists, History, and Documents. The 'NAME' section has four input fields: 'Name: First' (Sterling), 'Name: Middle (Optional)', 'Name: Last' (Archer), and 'Suffix (Optional)'. The 'ROLES' section contains two questions: '1. Is Sterling Archer a member of the Board of Directors of Team Civic Solutions?' with a 'Yes' dropdown and a 'Board Member(s)' dropdown menu; and '2. Is Sterling Archer a paid professional staff member or paid consultant of Team Civic Solutions?' with a 'Yes' dropdown and a 'Professional Staff Position(s)' dropdown menu.

### Employment Contract/History

1. Respond “Yes” or “No” to this question. If yes, you will be prompted to upload a copy of the staff member’s employment contract. If no, you will be prompted to upload a copy of the staff person’s resume.

### Compensation

From the drop-down menu choose the funding source used to cover the compensation to this member. Note: you must provide evidence of the paid position; volunteers do not meet the statute’s requirement for paid professional staff.

Under the Ownership tab:

### Ownership

Individual Experience: Ownership Role

1. Respond “Yes” or “No” to this question. If yes, select the boxes that best apply to the staff member’s experience.

### Development

Individual Experience: Development Role

1. Respond “Yes” or “No” to this question. If yes, select the boxes that best apply to the staff member’s experience.

Under the Projects tab, select the “Add Projects” button to add projects that support the individual’s affordable housing experience. A new window will open; please complete all relevant fields.

You will also find a Checklists tab that contains checklist items for every required field. This list will fill in automatically as you complete required fields and it will show 100% completed once you've answered every required question.

### Update an Existing Staff Member

To update an existing staff member profile, select the "Update" button on the far-right side where it appears next to the staff member you want to update.

To remove someone that is no longer a staff member, click the "Remove from Staff" button. This will not delete the contact; it only removes it from the current list of staff members.

The screenshot shows a web interface with a navigation bar at the top containing tabs: Legal Status, Organization Structure, Capacity & Experience, Checklists, Sign & Submit, Messages, Calendar, and Documents. Below the navigation bar, the section is titled "PROFESSIONAL STAFF".

There are two questions:

1. Does Team Civic Solutions have full-time paid, professional staff with housing management and/or development-related experience?  
A dropdown menu is shown with "Yes" selected.
1. Please review the professional staff of Team Civic Solutions below and update current staff, remove any that are no longer employed, and add any newly hired staff.

Below the questions is an "Add Staff Member" button with a person icon.

Below that is a table with the following columns: Full Report, Grid Edit, Email, More, and 3 Contact Assignment records. The table has two rows of staff members:

	Year	Name	Role(s)	Phone	Email		
<input type="checkbox"/>	2022	Sterling Archer	Chief Executive Officer	(985) 327-7227	dutchess@teamcivicsolutions.org		
<input type="checkbox"/>	2022	Cheryl Tunt	Real Estate Agent	(504) 555-6677			

Two red arrows point to the "Update" and "Remove from Staff" buttons in the first row of the table.

## Housing Experience/Development Portfolio

2. Respond “Yes” or “No” to this question. If yes, add a project by clicking the “Add Project” button. Complete all the required fields and select “save and close” at the bottom of the page or in the upper right corner of the page.

## History of Serving Community

3. Respond “Yes” or “No” to this question. If yes, click the “Add...” button to upload a statement signed by the board chairperson stating that the organization has at least one year of community service in the parish(es) where certification is requested. Also upload supporting documentation in the form of agreements, meeting minutes, advertisements, flyers, etc. of the organization’s activities within the selected parish(es). When the button is clicked, a new window will open. You can click the “Choose File” button and select the document from your computer or you can drag and drop the document on top of the “Choose File” button. Then click the green “Save & close” button.

### Funding Sources

Funding sources must be updated annually to show that the organization has capacity to operate without reliance on HOME funds. Click the “Add Funding Sources” button to add a new funding source record and complete the required fields. Click the green “save & close” button when done. Each funding source will appear in the list at the bottom of the Funding Sources section as you add it.

**FUNDING SOURCES**

4. Please add all funding sources in Team Civic Solutions's current budget.  
**THIS INFORMATION MUST BE UPDATED ANNUALLY**

+ Add Funding Source

Full Report | Grid Edit | Email | More ▾ 1 Organization Funding Source

	Funding: Source	Funding: Amount	Funding: Cycle	Funding: Duration
<input type="checkbox"/>	ABCD	\$50,000.00	Annual	
<b>TOT</b>		<b>\$50,000.00</b>		

### Annual Budget

You must provide a copy of your annual budget each year to show that the organization is fiscally sound and following generally accepted accounting principles. Click the “Add Annual Budget” button to upload a copy of your budget. A new window will open. You can click the “Choose File” button and select the document from your computer, or you can drag and drop the document on top of the “Choose File” button. Select the green “Save & close” button. Your saved document will appear at the bottom of the Annual Budget section.

**ANNUAL BUDGET FOR 2022**

5. Please provide a copy of Team Civic Solutions's current annual budget.  
**THIS DOCUMENT MUST BE UPDATED ANNUALLY**

+ Add Annual Budget

Full Report | Grid Edit | Email | More ▾ 1 Document

	Document Name	Tags	Submitted	Submitted By	Status	Status Date/Time	Link
Active (1 Document)							
<input type="checkbox"/>	Annual Budget Team Civic Solutions Certification ; Budget		06-01-2022 03:43 PM	Campani, Stephanie	Active	06-01-2022 03:44 PM	Screen Shot 2022-03-04 10:00:00 AM

## Audited Financial Statements

If you received \$750,000 or more in federal funding for a year you must have an independent financial audit completed for the year. LHC requires that you provide the latest two years of audited financial statements. If you received less than \$750,000 in federal funding for last year you may provide a copy of your 990 in lieu of an audited financial statement.

Click the “Add Audited Financial Statement” button to upload copies of your last two audited financial statements. A new window will open. You can click the “Choose File” button and select the document from your computer, or you can drag and drop the document on top of the “Choose File” button. Select the green “Save & close” button. Your saved document will appear at the bottom of the Audited Financial Statements section.

Select the “” button.

## D. The Checklists Tab

This tab contains checklists to determine whether your Certification Request is complete. Each major section of information has a checklist and there is a checklist for all necessary documents as well. The percentage complete and a graphic bar indicating progress shows at the top of each checklist. If an item is complete, the checkbox next to it will automatically be checked.

**Certifications > Edit 221074-CHDO** Save & close Cancel  
▶ Reports & Charts

**LEGAL STATUS SECTION** 100%

- ✓ Threshold Qualifications: Question 0: Response
- ✓ Threshold Qualifications: Question 0a: Response
- ✓ Entity Formation: Question 1: Response
- ✓ Entity Formation: Question 1a: Response
- ✓ Governance: Question 2: Response
- ✓ Governance: Question 2a: Response
- ✓ Profit Prohibition: Question 2b: Response
- ✓ Profit Prohibition: Question 2c: Response
- ✓ Purpose: Question 2d: Response
- ✓ Purpose: Question 2e: Response
- ✓ Low Income Input: Question 2f: Response
- ✓ Low Income Input: Question 2g: Response
- ✓ Non-Profit Designation: Question 3: Response
- ✓ Non-Profit Designation: Question 3a: Response
- ✓ Service Area: Question 4: Response
- ✓ Service Area: Question 4a: Response
- ✓ Financial Accountability: Question 5: Response

**ORGANIZATIONAL STRUCTURE SECTION** 91%

- ✓ Organization Structure: Question 1: Response
- ✓ Organization Structure: Question 1a: Response
- ✓ Board of Directors: Chairperson Entered
- Board of Directors: All Member Records Completed
- ✓ Board of Directors: At Least 1/3 Low Income Representation
- ✓ Board of Directors: Maximum of 1/3 Public Sector
- ✓ Organization Structure: Question 3: Response

**CAPACITY & EXPERIENCE SECTION** 88%

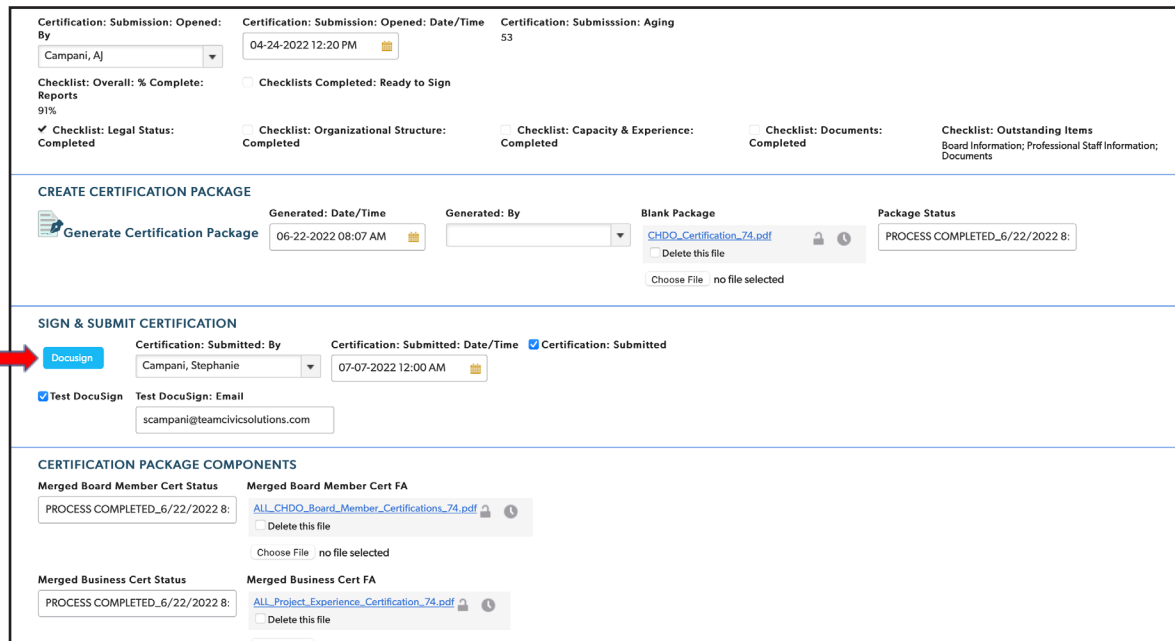
- ✓ Professional Staff: CEO Entered



## E. The Sign & Submit Tab

Once you have completed all checklists you will be able to generate your certification request under this tab, then generate a DocuSign envelope for all of your board members and staff to sign electronically. It takes several minutes to generate your certification request; please refresh after waiting for a short while and you will see your blank certification in the field labeled “Blank Package.” Once your package is generated, you will see the blue DocuSign button. Click this button and then click “Generate Envelope.” Please see the HMS User Guide for DocuSign for specific instructions on completing the DocuSign signing process.

Note: Be certain that all email addresses are correct; the DocuSign envelope will not be able to be completed if someone doesn't receive it and/or doesn't sign.



## F. Messages

The Messages tab shows all messages sent via HMS to and from your organization, including requests for additional information and documentation, results of reviews and explanations for non-approval of documents, etc.

*The development of the Housing Management Systems is funded under contract with CSRS, Inc. with partner Team Civic Solutions.*

