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Illinois Housing Development Authority

DMS Authority Online

User's Manual

for Property Owners and Agents

Revised 3/18/2025



DMS

Authority Online User Guide

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Overview

What is DMS Authority Online?

DMS is the **Data Management System** that IHDA uses to monitor and maintain property, tenant and compliance information for its portfolio.

DMS Authority Online is a web portal available to property Owners and Agents to manage compliance reporting directly into IHDA's DMS. The system is currently available to properties financed by Low Income Housing Tax Credits (LIHTC). The site continues to be expanded and will eventually be available for managing award information and compliance for other properties.

**DMS Authority Online does not replace ShareFile, IHDA's secure document delivery server. For more information on ShareFile, please refer to the ShareFile User's Manual on IHDA's website.

How Owners/Agents Use DMS Authority Online:

Reporting through DMS Authority Online is mandatory for LIHTC-financed properties. Owners and Agents of these properties must use DMS Authority Online to:

- Register users and give permissions
- Enter Utility Allowances
- Report Tenant Event information
- Submit Annual Owner's Certification

LIHTC Awardees that do NOT report through DMS Authority Online are subject to an 8823 during the compliance period, a penalty fee, and will be considered noncompliant with respect to future funding or modification requests to the Authority.

Please note that IHDA no longer accepts the annual TST-2, the Tenant Profile Compliance Report, for reporting Tenant Events. Submission of the TST-2 is still required for awardees whose property also receives IHDA HOME, CDBG, NSP or NHTF funding. Please refer to the Compliance Connection webtool to determine if this applies to the development.



Registration

Owner Must Register First

Registration is your request for access to each of your properties in IHDA's data management system, so that you can perform compliance functions through DMS Authority Online.

Representatives of the property Owner and the Property Management Company may submit a registration request for access to one or more property Awards.

However, the property Owner must submit a registration request first. Once IHDA has approved the Owner's request, other users may submit registration requests tied to that property Award and the Owner may give them permission to access property information.

Property Managers who attempt to register for a property Award number before the Owner has registered for that Award will receive an error message that prevents them from submitting their registration request.

Navigate to DMS Authority Online

Navigate to <https://adms.ihda.org/AuthorityOnline/>. Using Internet Explorer as your web browser may improve page displays.

Click on "New User? Register Here". This will take you to the registration screen.

Registration Screen

1. Fill out your Profile Information, including:
 - Name
 - enter a Username (Please use your business e-mail)
 - create a Password
2. Enter your **Organization Code**

Your Organization Code is assigned by IHDA. The Code is included in the DMS Registration e-mail reminders you have received. Once you enter the Code, the other fields under "Organization" will autofill.

What if I cannot find my organization code?

Contact your assigned IHDA Compliance Analyst to request your Organization Code.



Important

Please Do Not select “My Organization is Not Registered,” or manually enter your Organization Information. Doing so will reintroduce your organization in DMS and may delay approval of your registration request.

3. Establish your **Access Type**.

For LIHTC Awards, check “Annual Owner Certification and 8609 Access for Rental Housing.”

4. Click **Next Screen**

Owner Certification Access Screen

Use this screen to identify each property that you want to access in DMS by its IHDA Award Number.

1. Enter the property’s **Award Number**.

- The Award Number is the IHDA Tax Credit Award Number. It is **NOT** the Property’s BIN Number.
- You may request or verify Award Numbers by e-mailing your assigned IHDA Compliance Analyst.
- **DO NOT** use dashes when entering the Award Number (even though dashes are used in the example on the screen).

2. Select **Access Type** to indicate your role in relation to this property:

- Owner
- Property Manager
- Other

3. Click **Add** to include this property in your registration request.

You must add at least one Award number to complete your registration request.

If you receive an error message when you try to add an Award number, double check to make sure that:

- You are using the IHDA Tax Credit Award number, and not the property BIN number.



- The Award number is entered in the correct format: do not use dashes.
- The Owner has registered (or you have indicated you are the Owner, if appropriate). The Owner must register and receive notice that their registration is approved before a Property Manager or Other user can complete a registration request.

You may continue to add additional Award numbers.

You may also go back and add additional Award numbers after your registration has been approved. See instructions under **Post Registration Set-up** below.

4. Select **Next** once you have entered all the Awards you want to access.
5. Submit your request.

Owner registration requests must be approved by IHDA.

IHDA will review basic set-up information for your organization's properties and awards prior to approving your registration request. IHDA staff may request additional information to complete basic set-up prior to approval.

Owners will be notified by e-mail from DMS Authority Online when their Registration has been approved.

Registration requests submitted by Property Managers and Other users will be approved by the Owner, when the Owner **Assigns Permissions**.



Post Registration Set-Up:

Once you have received notification that your registration has been approved you can access your projects through DMS Authority Online, request additional awards, and assign permissions.

Accessing Projects

Once you have received notice that your registration has been approved you can login.

1. Navigate to DMS Authority Online: <https://adms.ihda.org/AuthorityOnline/>
2. Enter you username and password
3. Click **Log In**.
4. Accept the **Terms of Use**. This will direct you to the **Program Screen**.
5. Select **Owner Certification**.

This will bring you to a **Properties Listing** page. Each of the Properties assigned to you will be listed by the year or effective date of the Owner Certificate.

Select the Property and effective date you want to work in. To see additional years, click **See All Owner Certificates**.

Requesting access for additional Awards

Users may request access for additional property Awards after registration using the following steps:

1. After log-in, navigate to the **Programs** screen
2. Select **Owner Certification**.
3. Select **Request Another Property** from the side bar on the left.
4. Enter the property's Tax Credit Award number, without using any dashes. Remember that the Owner must register for each Award number first.

If you are the **Owner**, check the indicator box. After you submit your request, IHDA must approve your request for access to each new Award.



If you are a **Property Manager** or **Other** user: your access will begin after the Owner has assigned your permissions for the new Award.

Assigning Permissions

Owners must assign permissions to Property Managers and Other users who have registered for access to property Awards in DMS. To manage users who have requested access to your properties:

1. Login to the **Programs** page of Authority Online.
2. Select **Owner Certification** from the Program list.
Your properties are listed in blue, once for each certification year. [To see more certification years, check the box for “Show All Owner Certifications.”]
3. Select the Property listing for the effective date you want to manage.
4. Select **Manage Users** from the sidebar menu. You will see a list of User Access Requests.
5. For each request, you can select a permission **Access Group** and then select **Approve**. The user will be given access to permissions allowed for that Access Group, but only for the particular property or development that you have selected.

Changing Access Groups

To change permission Access Groups for existing users, click **Update** instead of **Approve**.

To remove a permission access request, or to remove permission access from an existing user, use the **Remove** button. If you remove a user from a project, and want to restore their access, they will have to re-apply.

Permissions allowed to Access Groups

1. **OC Editor:** A user with OC Editor access can enter utility allowances and enter or upload tenant events. OC Editor access does not allow a user to finalize an annual recertification.
2. **OC Viewer:** A user with OC Viewer access can see utility allowances and tenant events but can't edit that information.
3. **Property Manager:** A user with Property Manager access can finalize the project for the annual certification and manage limited user permissions, in addition to entering utility allowances and tenant events.



4. **Project Owner:** A user with Project Owner access can finalize a project for annual certification year and manage user permissions, as well as enter utility allowances and tenant events.
5. **8609 Progress Report Editor:** 8609 Progress Report Editor access is limited to the Progress Report area.
6. **8609 Progress Report Manager:** The user can see utility allowances, tenant events, building information and unit information, but can't edit that information. The user has access to the Progress Report area.



Annual Functions in Authority Online

Utility Allowances

Requirements and Prerequisites

Utility Allowances must be entered prior to entering or uploading Tenant Event information. Utility Allowances must be entered for each property, every year, even if they have not changed from the prior year.

In order to enter Utility Allowances, a User must have permissions, granted by the Owner, for one of the following Access Groups:

- Owner
- Property Manager
- OC Editor

Navigate to Utility Allowances

1. Login to **Program** screen
2. Select **Owner Certification** link, which will reveal a list of projects accessible to you. Each property will be listed once for each compliance year.

You can filter the list using the bar at the top of the list. To display previous years on your list, check the box **Show All Owner Certificates** above the list.

3. Click the blue link for the property and Effective Date (Compliance Year) you want to work in. This will bring you to the **Property Details** screen.
4. Select **Utility Allowance** button at the top right corner of the Property Details screen. This will route you to the Utility Allowances screen.

Change or Add a New Utility Allowance

The Utility Allowance screen will show a list of any utility allowances currently in the system, if any. You may **Copy** an allowance from the list, and edit the specifics (such as description, unit size, effective date).

To add a new utility allowance, follow these steps:

1. Click **Add New**. This will route you to the **Utility Allowance Entry** screen.
2. Enter your property information, including:



- Description: we suggest you enter a description that indicates unit type and effective year. You may have more than 1 type of unit with a particular number of bedrooms. For instance “1 Bdrm-A-2017”, or “1 Bdrm-B-2017”.
 - Effective Date: select or enter date the Utility Allowance goes into effect.
 - Bedrooms: select from drop down menu.
 - Allowance Type: select source of the Allowance figure from the drop down menu.
 - BIN #s: building ID numbers in this property are listed at the top right of the screen. Select each building to which the Utility Allowance will apply.
3. Enter information on each utility paid by the tenant on the **Utility Type** table. If all the tenant paid utilities are bundled, you can enter the total amount under Utility Type **Other**.
 4. Click **Save**.
 5. Click **Return to Utility Allowance Listing** at top left of screen.
 6. Click **Add New** to enter an Allowance for another unity type.



Entering Tenant Event Information

Requirements and Prerequisites

Owners and Agents of properties with Low Income Housing Tax Credit Awards are required to enter Tenant Event Information into DMS.

Tenant Events, such as move-ins, move-outs, transfers and re-certifications are required for each year, for all units including non-program or market units, starting in 2014.

Once Tenant Events are current through the most recent compliance year, completion of the annual TST-2, the Tenant Profile Compliance Report, is **NO LONGER REQUIRED**.

In order to enter Tenant Events, a User must have permissions, granted by the Owner, for one of the following Access Groups:

- Owner
- Property Manager
- OC Editor

Entering a Tenant Event

1. Navigate to Programs page and select **Owner Certification**.
2. Navigate to **Properties Listing** page and select the property and effective date you want to work in.

****Important****

If this is your first time entering Tenant Event Data but is not your property's first year of operations, please enter tenant event data for each previous year of operations from 2014 before entering the current year data.

For example, if your property came online in 2012, start with year 2014. If your property came online in 2016, start with 2016.

Since this process can be time consuming, you may hire IHDA to enter your Tenant Event data by paying double your annual Compliance Fee. Please notify the DMS Administrator if you want to exercise this option.

3. Navigate to the **Property Details** page. A side bar will reveal a list of BIN Numbers associated with this property.



- Select “+” by each BIN# to show each unit
- Select “+” by each unit to show

4. Click **Add New Event** button.

5. **Event Details** screen:

This screen will either be populated with the last event that was entered, which could be from a previous year, or it will be blank if this is a new unit to Authority Online.

Required Fields:

Event Date: effective date of move in, recertification or move out

Event Type: select from drop down menu.

- Move In (unit must be vacant)
- Move Out
- Recertify
- Transfer
- Composition Update
- Rent Update
- Student Status Update

Initial Move In: this will self-populate if the Event Type is a Move In. Otherwise

Utility Allowance: select from drop down menu. Menu will reflect Utility Allowance options entered under section “Entering Utility Allowances”

Allowance Amount: will self-populate from the Utility Allowance you selected

Total Household Income: Income of the Household at the effective date of the event being entered. This can be entered manually. Or, if you elect to itemize the households Non-Asset and Asset Income in the sections below, the total will be calculated for you.

Household Income at Move In: enter manually if this is NOT a Move In event, if it is a Move In event this will self-populate

Rent Level %: select the % Area Median Income used for calculating the Maximum Rent Limit. For LIHTC units, the Limit should not be greater than 60% AMI. For non-LIHTC program units, select M.

Income Level %: Select the Maximum Income Limit as a % of Area Median Income. For LIHTC units, the Limit should not be greater than 60% AMI. For non-LIHTC program units, select M.



Tenant Rent Portion: Enter the amount that the tenant pays.

Special Needs Code: Select None if not applicable. Or select the code for the special need identifier.

Federal Rental Assistance Amount: Enter Zero if there is no additional rental assistance. Or enter the subsidy amount for project based assistance.

Non-Federal Rental Assistance Amount: Enter Zero if there is no additional non-federal rental assistance (such as a tenant based voucher) or enter the assistance amount.

Rental Assist Type: Select N/A if not applicable. Or select the type of subsidy: Project Based or Tenant Based.

Rental Assistance Source: Select N/A if not applicable. Or select the source of the subsidy.

HH Member Count: # of people in household, must be at least 1

All Student House: Select Yes or No.

Student Count: Enter number of students in the household

Student Explanation: Select if applicable.

Funding Program: currently, only LIHTC, TCAP, 1602 and IAHTC are being tracked. This field will not be complete for Non Program or Market Units.

Required: Tenant Information

Household Members Table:

- All household members must be included.
- Table will reflect household members in last Tenant Event entered.
- Click "Add Member" to add a new household member.
- Must enter all fields.
- Relationship Field: one household member must be the Head of Household
- Click "Delete" to delete an existing household member

Optional: Income Information

- Completion of the following information is recommended.
- It is required if you choose to generate a TIC from DMS if it is not complete.



Non Asset Income Table

- You may enter income details by household member. These fields are not required for IHDA reporting. You will need to do this if you want to use Authority Online to generate a TIC (TST-3).

Asset Income Table

- You may enter income details by household member. These fields are not required for IHDA reporting. You will need to do this if you want to use Authority Online to generate a TIC (TST-3).
- If you enter income in these fields, the **Total Household Income** field will re-adjust to reflect the total income reported in these fields.

6. **Calculate** Total Household Income & Member Income: Click to recalculate total household income to include income from assets.
7. Select **Update** at the bottom of the Tenant Information screen to update the Tenant Event. Continue to the next unit.

Generating a Tenant Income Certification (TIC):

Owners and Agents may choose to use DMS Authority Online to generate TICs for tenant signature.

After selecting **Update** in step 6 above, the TIC form option will pop up. Click **Open**. DMS will generate a TIC populated with information from the Tenant Event.

Verify all information for accuracy.

All adult household members, and an Owners Representative, must sign and date the form.

Entering Market Unit Information

It is important that you enter Tenant Event information for all Market Units. Failure to do so will create errors when you attempt to generate an Annual Certification.

To create a Tenant Event for a Market unit, identify the unit as **Market** in the Unit Identity field.

Enter minimal information in **Event Details**. For example:

- Total Household Income – enter \$1
- Tenant Rent Portion – enter \$1
- HH Member Count – enter 1
- Funding Program – do NOT check LIHTC



Enter minimal information under **Add Member**. For example:

- Create a Birthdate
- Do not enter Race and Ethnicity information
- Choose a Gender

Continue to enter Tenant Events for Market Units each year after Move In by selecting **Rent Update** as the Event Type.

Common Tenant Event Entry Errors:

1. Failing to enter **Market Units** in Tenant Events.
2. Choosing a rent or income limit below 30% AMI or above 80% AMI (i.e. 10% AMI, or 80% AMI).
3. Failing to change **Unit Identity Type** field to **Market Unit** in cases where:
 - the Rent or Income Limit for a unit exceeds the tax credit limit of 60% AMI.
 - a qualified tenant's income has increased to more than 140% AMI after move-in.
4. Failing to enter any amount in the "Subsidy" field if the "Rent" amount is \$0.00.



End of Year Processes

Annual Certification

Requirements and Prerequisites

Owners of properties with federal Low Income Housing Tax Credits must submit an annual Owner's Certification that they are in compliance with all program requirements. To do this, follow the steps below:

1. Login to **Programs** screen.
2. On Programs screen, select **Owner Certification**. This will bring you to the **Properties Listing** screen.
3. From Properties Listing screen, select the **Property** listing for the **Effective Date** you want to certify. The Annual Cert Status must be **Active**. This will bring you to the **Property Details** screen.
4. Select **Annual Certification** from the list in the top right corner of the Property Details screen. You will see 3 pages in the Annual Certification:
 - Property General Information screen
 - Annual Certification
 - Submit Annual Certification

Review all information on the 1st two pages carefully. In each section, you will be asked to select **Yes** or **No** in order to certify whether the information in the section is correct. If your answer requires an explanation, a text field will open up to allow you to clarify.

5. At the bottom of the page, **Save** each section before clicking **Next** to move to the next page.
6. On the last page of the Certification, you will be asked to enter your Name, Title, Company, E-Mail and Direct Contact Number.

Completing these fields serves as an **Electronic Signature** confirming that the Certification is being submitted by a person with authority to act on behalf of the Owner.

7. Click **Submit** at the bottom of the page.



Finalize Year

Requirements and Prerequisites

Once all Tenant Events for a year have been entered or uploaded, the year must be **Finalized** before IHDA staff will be enabled to run a Compliance Check.

Finalizing the Year also allows the Owner or Property Manager to:

- review certain basic compliance issues flagged during the Finalization, and
- generate a Fee Statement for payment of the Annual Compliance Fee.

Only the Owner and Property Manager Access Groups have permissions to Finalize the Year. Once the year has been Finalized, Tenant Event Data for that year can no longer be changed. Finalization can be reversed if it has been completed in error, but only by IHDA staff.

Finalize Year for a Property

1. Login to **Programs** screen.
2. On Programs Screen: select **Owner Certification**. This will bring you to the Properties Listing screen.
3. From **Properties Listing** screen: select the Property listing for the Effective Date you want to certify. The Annual Cert Status must be **Active**. This will bring you to the **Property Details** screen.
4. Select **Finalize Year** from the Property Details screen from the list in the top right corner of the Property Details screen. This will route you to the Start Finalization Process screen.
5. Click **Start Finalization**.
6. Correct errors, if any, indicated on the **Finalize Errors** screen. This screen will list errors detected in Tenant Event Data.

To correct Tenant Event Data errors...

Select the error from the list. You will be brought to the original data entry screen to make modifications.

After making corrections, navigate back to the Finalize Year button to start the Finalization process again.



Once all modifications are complete, and the Finalize Errors screen contains no Errors, click **Proceed to Finalize**.

7. Click **Finalize** on the Finalize Certification Year to generate the Authority DMS Tax Credit Invoice.
8. You will be given the option to open or save the invoice. Click **Open** to show the invoice.
9. Verify the accuracy of the project information, and the compliance fee, which is based on the number of units in the property. Print and return the bottom portion of the invoice with you payment.