EXTERNAL USER GUIDE TO THE HOUSING CONTRACT SYSTEM

Section 1. Creating an Activity (New Reservation)

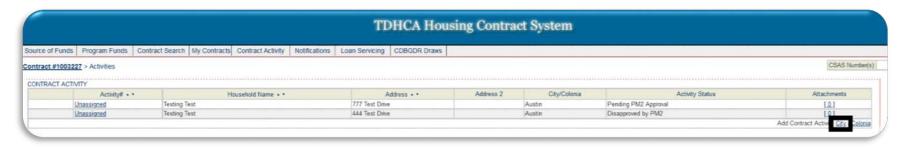
- 1) Select the "My Contracts" tab
- 2) Select the appropriate Contract Number by verifying the property's setaside type
 - a) Contract "Bootstrap 2/3 Reservation Project" must be used for all 2/3 setaside census tracts
 - b) Contract "Bootstrap Statewide Reservation Project" must be used for all 1/3 setaside census tracts
 - i) To determine if the property address is located within a 1/3 or 2/3 census tract, please search for within the geomap website (link below). The search results will list the census tract on the left hand side as the "Tract Code." Take the "Tract Code" and do a search (alt+F) within the Eligible Census Tracts spreadsheet exactly as it is written. A 2/3 setaside tract will always be found within the spreadsheet so anything that's found would be submitted under the 2/3 setaside contract and anything that can't be found would be submitted under the 1/3 setaside contract (Statewide).
 - (1) Geomap Website (https://geomap.ffiec.gov/FFIECGeocMap/GeocodeMap1.aspx)
 - (2) Census Tract Spreadsheet -(https://www.tdhca.state.tx.us/ocidocs/EligibleCensusTracts.xlsx)



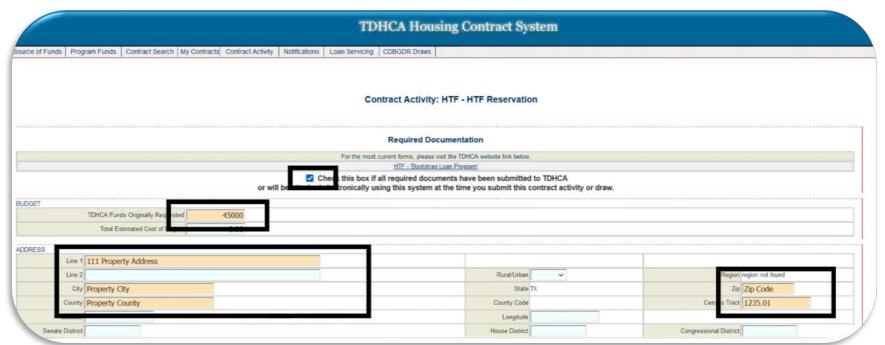
3. Select "Activities" on the top right corner of the screen

TDHCA Housing Contract System							
Source of Funds Program Funds	Contract Search	My Contracts	Contract Activity	Notifications	Loan Servicing	CDBGDR Draws	
Allocate Funds							Notes Perf Req: Activities Areas Served Vendors

4. Select "City" next to the Add Contract Activity text.



5. Enter all of the information for the new reservation you are submitting. Include any field that is highlighted in yellow and select the box listed towards the top to confirm that you will be uploading the documents listed on the New Reservation Checklist after the data is entered. Select "Save" once the checkbox is selected and all of the highlighted fields have been entered. Reservations without proper documentation will be disapproved. The HIC date is the date the date the Owner-Builder Application Certification was signed. Select yes for LI if it is a 2/3rd Tract.



6. Select the "Attachment" link.



7. Select the Attach a Document link at the bottom right.



8. Select the "Reservation Setup Document" option from the drop dropdown option, enter "New Reservation Checklist" as the description of the file and upload all of the items from the New Reservation Checklist (as one pdf) through the Browse option on your computer and click "Save."



9. Once the documents have been uploaded, select the "Unassigned" link above to go back to the main activity page.



10. Scroll down to the Loan section and select the "Loan Information" link.



11. Enter as much information as you can for the loan being requested. Be sure to do a search for the Title Company that you will be using during closing to avoid any delays. Click "Save" once all of the information has been entered.



12. Select the "Budget Detail" link under the Allocation section.



13. Select the "Itemize" link.



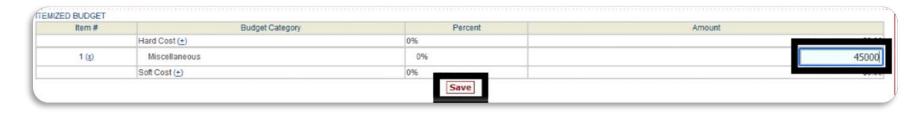
14. Select the "+" link next to Hard Cost under the Itemized Budget section.



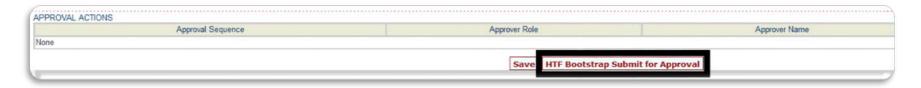
15. Select "Miscellaneous" option and click "Save."



16. Enter the loan amount requested within the amount field on the right-hand side and click "Save."



17. Select the "Unassigned" link above again to go back to the main activity page and select the "HTF Bootstrap Submit for Approval" button at the bottom of the screen.



- 18. This will change the status of the activity to "LE Submitted." Program Staff will review the information and release a Loan Estimate if all of the information needed to generate the Loan Estimate has been submitted and attached. Program Staff will update the status of the activity to "LE Deficiency" if any information is missing and send out an email that list the deficiencies. Once deficiencies have been cured and uploaded as attachments, select the "HTF Bootstrap Submit for Approval" button again and Program Staff will review the updated documents.
- 19. If no additional items are required, Program Staff will generate and release the Loan Estimate within three business days and update the status to "LE Approved." Once released, provide the Loan Estimate to the applicant, have them date and execute the Loan Estimate & Acknowledgement, attach the executed LE and Acknowledgement to the activity, go back to the "unassigned" page, and click on the "Submit for Approval without Saving" button. AN EXECUTED LOAN ESTIMATE IS REQUIRED BEFORE A LOAN COMMITMENT IS RELEASED.
- 20. The status will then change to "Pending PM Approval." At this point, Program Staff will review the full application and, if any information is missing, set the status to deficiency again. Select the "HTF Bootstrap Submit for Approval" button again once all of the items listed in the deficiency have cured and uploaded.
- 21. If the household is found eligible and no deficiencies are pending, Program Staff will update the status to "Pending Upload." Program Staff will release the Loan Commitment Contract through DocuSign for all parties to execute. A copy of the executed Loan Commitment Contract will be available within the activity's attachments. You will have 12 months from the date of the Loan Commitment Contract to submit for a closing. Closing MUST take place before the Loan Commitment Contract expires.

Section 2. Requesting a Closing

- 1. Select the "My Contracts" tab
- 2. Select the appropriate Contract Number



3. Select "Activities" on the top right corner of the screen



4. Select the "Unassigned" link next to the activity you are requesting to close.



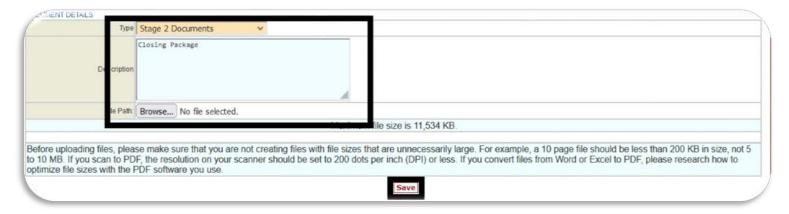
5. Select the "Attachments" link under the overview section.



6. Select the "Attach a Document" link at the bottom right.



7. Select the "Stage 2 Documents" option from the dropdown option, enter the description of the file as "Closing Package" and upload all of the items as one PDF through the Browse option on your computer and click "Save."



8. Once the documents have been uploaded, select the "Unassigned" link above to go back to the main activity page.



9. Select the "HTF Bootstrap Submit for Approval" button at the bottom of the screen.



10. Program Staff will update the status of the activity to "Deficiency" if any information is missing and send out an email that list all deficiencies. Once deficiencies have been cured and uploaded as attachments, select the "Submit for Approval without Saving" button again and Program Staff will review the updated documents.

If all items are approved, Program Staff will update the status to "Pending PM2 Approval" for QA's approval. QA will review the information and submit it to the Closing Department for their review.