

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>)

The screenshot shows the TDHCA Housing Contract System interface. The 'My Contracts' tab is highlighted in the navigation menu. Below the navigation menu, there is a 'Notifications List' section. A table displays contract details for a specific contract number.

Contract Number	Administrator	CSAS Number(s)	Program Name	Program Activity Type	Setaside Type	Contract Begin Date	Contract End Date	Status
1003227	Bastrop County		HTF	HTF Reservation	Bootstrap Statewide Reservation	1/1/21	1/1/25	Active

3. Select “Activities” on the top right corner of the screen

The screenshot shows the TDHCA Housing Contract System interface. The 'Activities' tab is highlighted in the top right corner of the navigation menu.

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

TDHCA Housing Contract System

Source of Funds | Program Funds | Contract Search | My Contracts | **Contract Activity** | Notifications | Loan Servicing | CDBGDR Draws

Contract #1003227 > Activities CSAS Number(s):

Activity#	Activity#	Household Name	Address	Address 2	City/Colonia	Activity Status	Attachments
Unassigned	Testing Test		777 Test Drive		Austin	Pending PM2 Approval	[0]
Unassigned	Testing Test		444 Test Drive		Austin	Disapproved by PM2	[0]

Add Contract Activity **City** Colonia

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.

TDHCA Housing Contract System

Source of Funds | Program Funds | Contract Search | My Contracts | **Contract Activity** | Notifications | Loan Servicing | CDBGDR Draws

Contract Activity: HTF - HTF Reservation

Required Documentation

For the most current forms, please visit the TDHCA website link below.
[HTF - Bootstrap Loan Program](#)

Check this box if all required documents have been submitted to TDHCA or will be submitted electronically using this system at the time you submit this contract activity or draw.

BUDGET

TDHCA Funds Originally Requested: 45000

Total Estimated Cost of:

ADDRESS

Line 1	111 Property Address	Rural/Urban		Region region not found
Line 2		State TX		Zip Zip Code
City	Property City	County Code		Census Tract 1235.01
County	Property County	Longitude		
Senate District		House District		Congressional District

6. Select the "Attachment" link.

OVERVIEW		
Administrator Name: Bastrop County	Status: Pending	Contract #: 1003227
Contact Name: Jackie Welsh	Phone #: 5129367790	Tracking ID: 152687
Household Name: Test Testing	Activity Number	UOG Code
Coowner Name	Activity Type: HTF - HTF Reseration (Single-Family 2021)	UOG Number
Primary Special Need: <input type="text"/>	Setaside Type: Bootstrap Statewide Reseration	CPS Number (DIS)
		QA Review
		(0) Attachment(s)

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

Electronic Document Attachments			
ATTACHMENTS			
Type	Description	Path	
			+ Attach a Document

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."

TDHCA Housing Contract System

Source of Funds | Program Funds | Contract Search | My Contracts | Contract Activity | Notifications | Loan Servicing | CDBGDR Draws

Contract #1003227 > Activities > Unassigned > Electronic Document Attachments Add

Electronic Document Attachments

DOCUMENT DETAILS

Type	Reservation Setup Documents <input type="text"/>
Description	<input type="text" value="New Reservation Checklist"/>
File Path	<input type="button" value="Browse..."/> No file selected.

Maximum file size is 11,534 KB.

Before uploading files, please make sure that you are not creating files with file sizes that are unnecessarily large. For example, a 10 page file should be less than 200 KB in size, not 5 to 10 MB. If you scan to PDF, the resolution on your scanner should be set to 200 dots per inch (DPI) or less. If you convert files from Word or Excel to PDF, please research how to optimize file sizes with the PDF software you use.

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.

The screenshot shows the 'LOAN INFORMATION' form within the TDHCA Housing Contract System. The breadcrumb path is 'Contract #1003227 > Activities > Unassigned > Loan'. The form is divided into three main sections: 'LOAN INFORMATION', 'ORIGINATION INFORMATION', and 'TRACKING OF LOAN DOCUMENT PREPARATION'.
 - **LOAN INFORMATION:** Includes fields for Type Of Loan (Real Property - Repayable), Requested Lien Position (First Lien), GF Number, Lien Information, Construction Company, Title Company (Austin Title), Contact Name (Test Test), Fax (512-111-1111), Loan Number of Years (30), Maturity Date, Total Loan Amount (45000), Purpose of the Loan (Purchase Money), Construction Completion Date, Note Effective Date, and Deferral/Payment Start Date.
 - **ORIGINATION INFORMATION:** Includes Loan Originator Organization (LOO) (Habitat for Humanity), Loan Originator (LO) (Test Testing), LOO NMLSR ID (111111), and LO NMLSR ID# (111111).
 - **TRACKING OF LOAN DOCUMENT PREPARATION:** Includes checkboxes for File transferred to Program Services, File sent for loan preparation, Loan documents to title company, Tracking Number (Shipping), HUD Approval, HUD Settlement, Funding approval, Executed loan documents to Post Close Review, and Executed loan documents to Loan Servicing.
 At the bottom center of the form, a 'Save' button is highlighted with a black box.

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

ALLOCATION									
Fund	Funded	Total Drawn	Refunded	Net Drawn	Available	Hist	Draws		
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			Budget Detail

13. Select the "Itemize" link.

PLANNED BUDGET							
Budget	Total Budgeted	TDHCA Original	Amended	Funded	Itemized	Unitemized	
	\$0.00	\$45,000.00	45,000.00	\$0.00	\$45,000.00	\$0.00	Itemize

[Save](#)

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

ITEMIZED BUDGET				
Item #	Budget Category	Percent	Amount	
	Hard Cost (+)	0%		\$0.00
	Soft Cost (-)	0%		\$0.00

[Save](#)

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

BUDGET CATEGORY	
Parent Category	
Hard Cost	
	Acquisition/Deed Conversion (HTF Hard)
	General Construction Costs (HTF Hard)
	Miscellaneous (HTF Hard)

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

ITEMIZED BUDGET			
Item #	Budget Category	Percent	Amount
	Hard Cost (+)	0%	
1 (x)	Miscellaneous	0%	45000
	Soft Cost (+)	0%	

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.

APPROVAL ACTIONS		
Approval Sequence	Approver Role	Approver Name
None		

Save **HTF Bootstrap Submit for Approval**

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



The screenshot shows the 'My Contracts' tab selected in the TDHCA Housing Contract System. A table titled 'YOUR CONTRACTS' displays the following data:

Contract Number	Administrator	CSAS Number(s)	Program Name	Program Activity Type	Setaside Type	Contract Begin Date	Contract End Date	Status
1003227	Bastrop County		HTF	HTF Reservation	Bootstrap Statewide Reservation	1/1/21	1/1/25	Active 📄

3. Select “Activities” on the top right corner of the screen



The screenshot shows the 'Activities' tab selected in the TDHCA Housing Contract System. The navigation bar includes '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 the “Unassigned” link next to the activity you are requesting to close.



The screenshot shows the 'Activities' page for Contract #1003227. A table titled 'CONTRACT ACTIVITY' displays the following data:

Activity#	Household Name	Address	Address 2	City/Colonia	Activity Status	Attachments
Unassigned	Testing Test	777 Test Drive		Austin	Pending PM2 Approval	[0]
	Testing Test	444 Test Drive		Austin	Disapproved by PM2	[0]

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

Contract #1003227 > Activities > #3227001 CSAS Number(s):

OVERVIEW

Administrator Name	Bastrop County	Status	Pending PM Approval	Contract #	1003227
Contact Name	Jackie Welsh	Phone #		Tracking ID	152662
Household Name		Activity Number	3227001	UOG Code	
Coowner Name		Activity Type	HTF - HTF Reservation (Single-Family 2021)	UOG Number	
Primary Special Need	<input type="text"/>	Setaside Type	Bootstrap Statewide Reservation	CPS Number (IDIS)	
				QA Reviewer	

[0] Attachment(s)

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

Electronic Document Attachments

ATTACHMENTS

Type	Description	Path
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+ Attach a Document

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."

DOCUMENT DETAILS

Type	Stage 2 Documents
Description	<input type="text" value="Closing Package"/>
File Path	<input type="button" value="Browse..."/> No file selected.

File size is 11,534 KB.

Before uploading files, please make sure that you are not creating files with file sizes that are unnecessarily large. For example, a 10 page file should be less than 200 KB in size, not 5 to 10 MB. If you scan to PDF, the resolution on your scanner should be set to 200 dots per inch (DPI) or less. If you convert files from Word or Excel to PDF, please research how to optimize file sizes with the PDF software you use.

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.