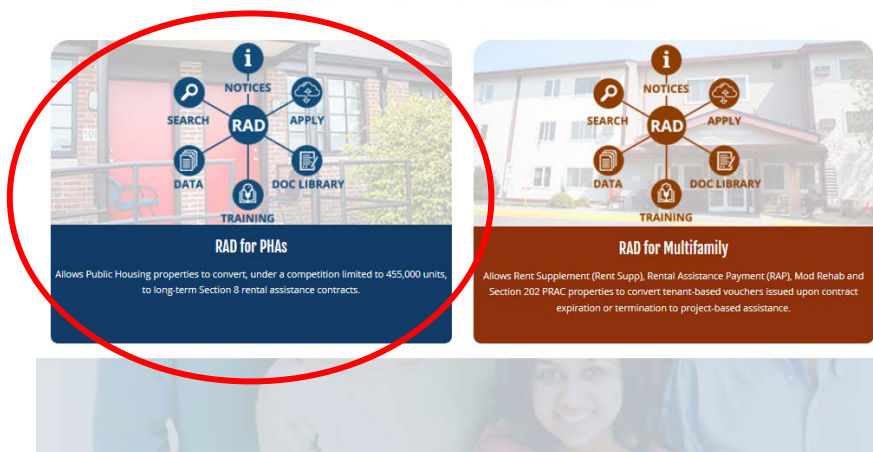


# RAD Resource Desk User Guide: For PHAs



## TWO COMPONENTS

The Rental Assistance Demonstration Program (RAD) allows proven financing tools to be applied to at-risk public and assisted housing under two components:



[www.radresource.net](http://www.radresource.net)

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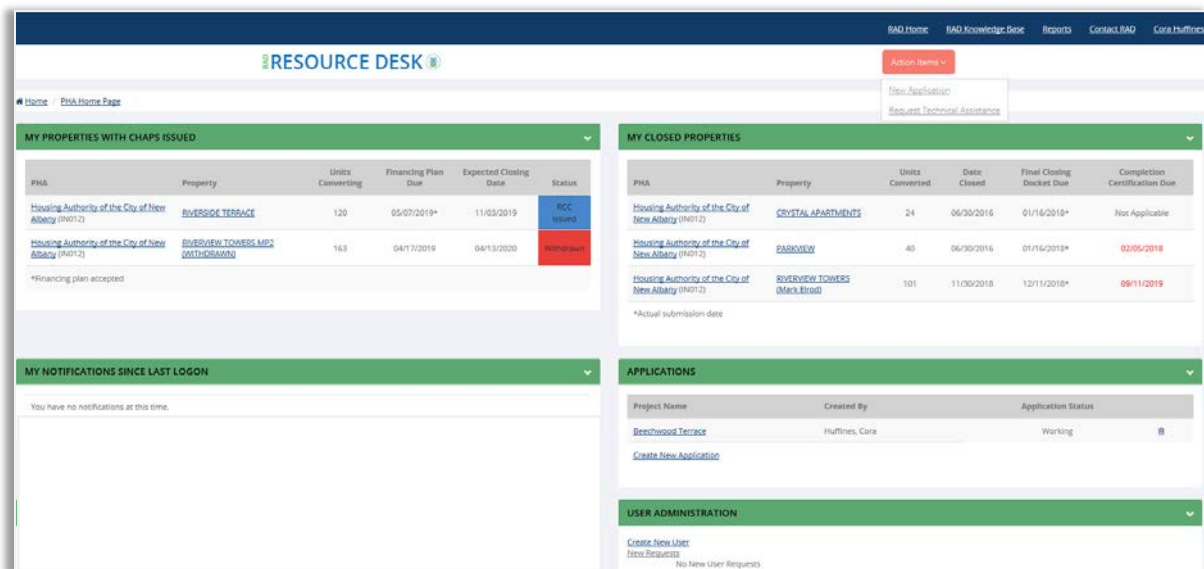
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## About this Guide

This guide is intended to assist new and existing RAD Resource Desk users navigate [www.radresource.net](http://www.radresource.net). It is intended for PHAs that have received CHAP awards under the first component of RAD.

## Part I: Your Home Page

Upon login, you will be taken to your custom homepage that contains various green menu cards to assist you in navigating the website. These green cards are moveable and collapsible. You can move any of the green cards on the page by clicking and dragging. You can expand/collapse each green card by clicking the caret on the right side of each card. More information on navigating the website can be found by viewing [this webinar](#).



**Home Page Action Items:** From your homepage, you can click on the Action Items menu bar and perform the following actions:

- **New Application:** Select **New Application** to start a new RAD application (to apply for RAD for units that are not already covered under a CHAP award).
- **Request Technical Assistance:** Select **Request Technical Assistance** if you have received a CHAP, haven't submitted a Financing Plan yet, and require technical assistance. You'll be taken to a new screen where you can provide details about what you need assistance with, such as discussing portfolio reengineering, third party reports (CNA e-tool, environmental), financing the conversion, general financing plan requirements, or general RAD Resource Desk website navigation/functionality. Once submitted, HUD will assign a staff member to contact you.

**My Properties with CHAPs Issued Menu Card:** All active properties (from CHAP issuance through closing) and any withdrawn projects appear on this card. The right-hand column displays the status of the conversion – Financing Plan Not Submitted, Financing Plan Submitted, RCC Issued, or Withdrawn. To

view the specifics of a property, click on the property name and you will be taken to the relevant page for that conversion based on the status shown.

**My Closed Properties Menu Card:** All closed properties appear on this card. The right-hand columns indicate the due dates of required post-closing submissions, such as the Final Closing Docket and the RAD Completion Certification. Any date in red indicates that a submission is past due. Any date with an asterisk (\*) indicates the date that the submission was made. To view the specifics of a property, click on the property name and you will be taken to the relevant page for that conversion based on the status shown (Final Closing Docket submission page or Completion Certification submission page).

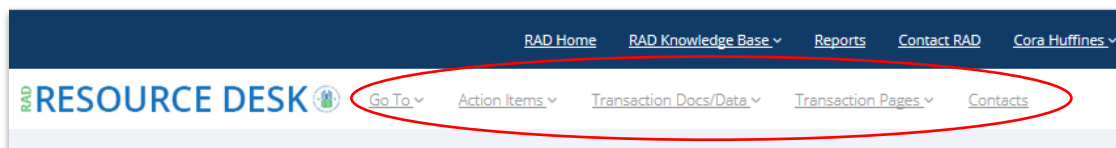
**My Notifications Since Last Login Menu Card:** This card lists activity that has occurred since your last RAD Resource Desk login, such as an RCC being issued.

**Applications Menu Card:** This card displays all pending RAD applications that are in process by your PHA or have been submitted to HUD for CHAP issuance. You can submit a new application at any time via the “Create New Application” link.

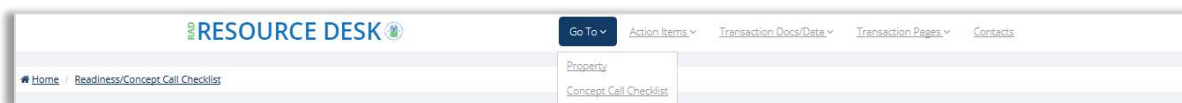
**User Administration Menu Card:** If your user type includes permissions to edit users, you will see this card which displays all users for your PHA. See later section on managing users for more information.

## Part II: Navigating Within a Property

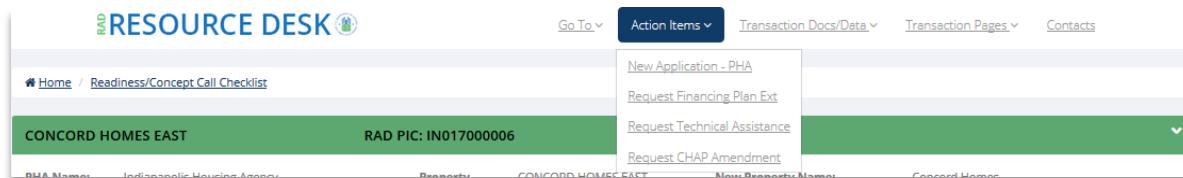
Once you have selected a property from the **My Properties with CHAPs Issued** green card, you can use the menus at the top of the page to navigate to various pages:



**Go To:** This menu allows you to jump to various sections on the page you are currently viewing (the “sections” of a page are depicted via green heading bars).



**Action Items:** This menu enables you to navigate to pages where you can submit a new RAD application (apply for a CHAP), Request a Financing Plan Extension for the property you are currently viewing, Request Technical Assistance from HUD, or request a CHAP amendment (see [Overview of CHAP Amendments & Contract Rent Flexibilities](#) for additional information).



**Transactions Docs/Data:** This menu enables you to navigate to view key documents and data pertaining to the transaction you are working on. Note that you cannot update any of the documents via these menu selections (see Transaction Pages below). This is where you can view the application materials that were submitted, the CHAP and any subsequent amended CHAPs, the online Rent Schedule, information on reserved units (from a Portfolio Award or Converted Awaiting Transfer agreement), the Operating Pro Forma and Sources & Uses, Executed RAD Conversion Commitment, and Financing Templates.

**Transaction Pages:** This menu enables you to navigate to view and edit key information and data pertaining to the transaction you are working on.

- **PHA Summary (PHA):** This page contains the check-in correspondence summary provided by your TA provider, if applicable, and high-level information about your current conversion(s). This is where PHA users can edit deal characteristics, such as PBV/PBRA, type of financing (no debt/conventional, LIHTC, FHA Financing), whether or not residents will be relocated, if a transfer of assistance is contemplated, etc. This information should be reviewed and updated following CHAP issuance as the PHA prepares the financing plan submission.
- **Concept Call Checklist:** Following CHAP issuance and prior to requesting a Concept Call in advance of Financing Plan submission, the PHA must complete and submit the checklist found on this page. This is also where PHAs go to request a concept call by clicking the “Schedule Concept Call” button. Note that the “Schedule Concept Call” button cannot be clicked until all required items in the checklist have been completed. More information on the Concept Call can be found [here](#).

- **Financing Plan (PHA):** This page is where the PHA uploads the Financing Plan submission, submits key Ownership information regarding the converting project (that will appear in the RAD Conversion Commitment), and inputs the DDA Number from the PIC Removal Application. To submit documents, use the **GoTo** menu to navigate to the **Financing Plan Documents** and click **Upload** in the appropriate row of the chart. You must click the red **Submit** button in order to notify HUD that your submission is complete and ready for review. There are standalone Financing Plan guides (one for each financing type – no debt/convention, FHA, non-FHA LIHTC) that can be found at the top of the Financing Plan upload grid and in the [Document Library](#) that provide more detailed information on Financing Plan requirements.
- **Transaction Log:** This page is where the PHA inputs and updates the operating pro forma and development budget for the converting project, including key business terms for all funding sources (by clicking the **Edit Sources** button in the Sources section of the column). The PHA should update the Transaction Log at Financing Plan submission and at Closing. Once a transaction has received an RCC, all changes in the Sources and Uses must be made in the “As Closed” column. There is also a column where the PHA can, in conjunction with HUD, log post-closing changes.
- **Closing:** Following Financing Plan acceptance and the issuance of a RAD Conversion Commitment (RCC), this page is where the PHA uploads the draft closing package for review by HUD. You must click the **Submit Draft Closing Package** button in order to notify HUD that your submission is complete and ready for review. If you do not click this button, your closing coordinator will not be notified of your submission. Note that you cannot click the Submit button until a document has been uploaded to each line item in the grid or the N/A box has been checked.
- **Final Closing Docket:** Following Closing, the PHA must upload a copy of the final closing docket via this page within 10 day of the effective date of the HAP contract. You must click the red **Submit** button in order to notify HUD that your submission is complete. More detailed instructions regarding this submission can be found [here](#).
- **Post-Closing Processing:** This transaction page is for PHAs that have a post-closing request that requires input or approval from the Office of Recap following conversion, such as a change in financing in order to complete the RAD scope of work, requesting release of a RAD-related restrictive covenant, etc. PHAs should select the post-closing activity from the provided list, upload their request and supporting documentation, and submit to HUD. Upon receipt, HUD will review and process your request.
- **Completion Certification:** Following completion of the rehab/construction approved in the RCC, the PHA must complete and submit this page. If no rehab occurred as a result of the RAD conversion, this page must be completed following closing (10 days following the effective date of the HAP contract). This page also contains the required Section 3 submission for transactions that had rehab/new construction. More detailed instructions regarding this submission can be found [here](#).



- **Public Housing Summary (PIH):** This page contains information on the status of the required PIH reviews that must be completed prior to conversion including the review of the PHA’s draft PIC removal certification, review of any non-dwelling units/lands for removal in conjunction with RAD, the status of the approval of the PHA’s Annual/Five Year Plan or Significant Amendment to the PHA Plan, the status of any CHAP conditions, and information on any open issues pertaining to existing debt (CFFP, OFFP, EPC). It also contains the names of the local PIH Field Office Reviewers assigned to the conversion.
- **Fair Housing Summary (FHEO):** This page contains information on the status of any required FHEO reviews that must be completed in order to convert such as Site Selection & Neighborhood Standards, Change in Occupancy, Unit Reduction or Configuration Change, and Accessibility and Relocation Plan Checklist. You can view the status of your submissions here, who they are assigned to and any corresponding comments/documentation.
- **Asset Management:** If you are converting to PBRA, this page will provide you with the appropriate contacts assigned to your conversion (Branch Chief, Asset Management RAD Specialist, Funding Specialist). If you are converting to PBV, this page is not applicable to your transaction.

**Contacts:** This download-able contact list contains a list of all active users that have access to your PHA’s RAD Resource Desk account (page 1) as well as all internal HUD staff that have been assigned to work on your RAD Conversion (page 2). Consult this list to find contact information for your RAD Transaction Manager, Closing Coordinator, PIH Reviewers, FHEO reviewers, HUD Attorney, and Multifamily Account Executive (PBRA only – also known as “OAMPO RAD Specialist”).

## Part III: Managing Users

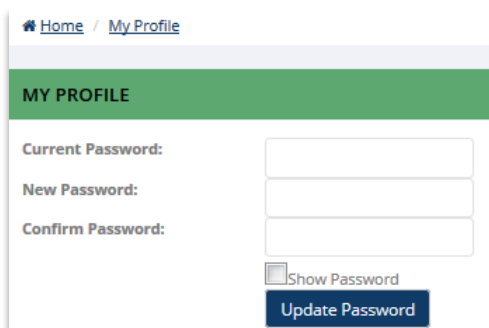
Each PHA controls who can access their RAD Resource Desk portal. This includes adding, approving, and removing users and also editing existing user rights regarding access permissions. All user administration is done via the **User Administration** card found on your homepage when you log into [www.radresource.net](http://www.radresource.net). Note that only users designated as a PHA Primary user or a user who has been designated with permission to add/approve/remove other users will see the **User Administration** card.

USER ADMINISTRATION		
<a href="#">Create New User</a> <a href="#">New Requests</a> No New User Requests <a href="#">Active PHA Users</a>		
User	Type	Status
<a href="#">Dohrman, Mark</a>		Active
<a href="#">Duggins, David</a>		Active
<a href="#">Huffines, Lisa</a>	Consultant	Not Approved
<a href="#">Huffines, Lisa</a>	PHA Primary	Active



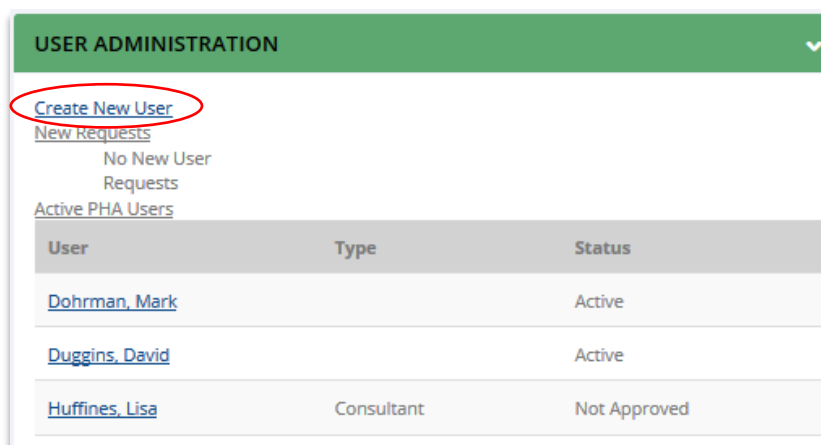
**Designating a Main Point of Contact (“PHA Primary”).** Each PHA must designate a main point of contact for the RAD conversion on the RAD Resource Desk, known as the “PHA Primary” user. This person is in charge of overseeing the PHA’s RAD Resource Desk account, managing other users, and will receive the bulk of communications from HUD staff. By default, the primary contact that the PHA lists when completing the online RAD application will be setup as the PHA Primary User.

**Changing a Password.** Once signed in, users can change their passwords by navigating to their name in the top right-hand corner of the page and then selecting **Profile**.



The screenshot shows a web interface with a breadcrumb trail 'Home / My Profile'. Below this is a green header bar labeled 'MY PROFILE'. The main content area contains three password fields: 'Current Password:', 'New Password:', and 'Confirm Password:'. To the right of these fields is a 'Show Password' checkbox and an 'Update Password' button.

**Create New User.** Only PHA Primary Users and users who have “Add/Edit/Approve Users” permission can add a new user to the website. To do so, navigate to the **User Administration** card and click the link titled **Create New User**. Complete the required information, including the level of access in the permissions section (Upload Documents, Upload Post Closing Docs Only, Write on PHA Pages) and a Username and Password. Note that if no permissions are selected, the user will have read-only access. Once complete, click **Enter** and the individual will receive an email from [resourcedesk@radresource.net](mailto:resourcedesk@radresource.net) alerting them that an account has been setup for them; this email will contain their username and password.



The screenshot shows a web interface with a green header bar labeled 'USER ADMINISTRATION'. Below this is a list of links: 'Create New User' (circled in red), 'New Requests', 'No New User Requests', and 'Active PHA Users'. Below these links is a table with three columns: 'User', 'Type', and 'Status'.

User	Type	Status
<a href="#">Dohrman, Mark</a>		Active
<a href="#">Duggins, David</a>		Active
<a href="#">Huffines, Lisa</a>	Consultant	Not Approved

**Requesting Access (New Account):** Users who currently do not have an active account can request access to your PHA’s portal on the RAD Resource Desk at any time by following the below steps:

1. Click **Login > Create An Account**
2. Complete the requested information, including selecting your PHA’s name from the Public Housing Agency dropdown menu.

### 3. Click **Submit**.

Upon clicking the Submit or Request Access button, the PHA Primary and users with Add/Edit/Approve Users rights will be notified via email of the new access request. All pending access requests will also appear in the User Administration card under New Requests.

### Requesting Access to Additional PHAs Through an Existing Account (for Consultants):

Users who currently have an active account with a single PHA but will be working with multiple PHAs, including financial and legal consultants, can use their existing login to gain access to multiple PHA's on the RAD Resource Desk. This allows users to maintain one set of login credentials instead of having to setup multiple accounts (one for each PHA). To request access to an additional PHA on the same account, follow the below steps. You do not need to create a new account to get access to another PHA.

1. Once logged into your account, click **Profile** from the drop-down menu in the top right corner of the screen with your name.
2. Scroll down to **Additional PHA Access**, then select the requested PHA from the drop-down menu.
3. Click **Request Access**.

**Approving a User Access Request:** To approve a pending request, follow the below steps. Please note that a request can come from a staff member at the PHA or an outside consultant, whose account is set up to regularly work with multiple PHAs. Upon approval, the user will receive an automated email from the Resource Desk containing their login credentials and notifying them that their access has been approved.

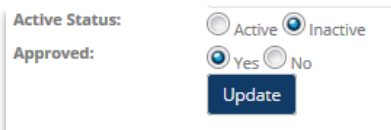
1. Login and navigate to the **User Administration** card on your homepage
2. Under **New Requests**, click on the name of the user you wish to approve. If you don't see the name you were expecting under **New Requests**, you can click the user's name from the Active PHA Users list below.
3. On the next screen, set the permissions (see below for information on permissions), select **Active**, select **Yes** for Approved, and click **Update**.

**Setting Permissions/Editing Rights to an Existing User.** Once a user is active, you can edit his or her permissions. If no permissions are selected, the user will have read-only access. Below is an overview of the various permissions:

- **Add/Edit/Approve Users:** User will have access to the User Administration card on their homepage and can add new users, approve user requests, and edit existing user permissions. While the PHA Primary user has this ability, it is recommended that the PHA setup at least one other user with these permissions to ensure user requests and permissions are kept up to date.
- **Assign Properties to Users:** *\*Coming Soon\* Ability to assign a user to a specific property (or properties) on the RAD Resource Desk. For example, if you have 10 active RAD transactions but a third-party developer is only involved in one of those deals, you can restrict his or her access to that specific deal.*
- **Notifications:** User will receive all automated RAD Resource Desk email notifications regarding the PHA's RAD conversion(s).

- **Primary PHA User:** This user is the person who will serve as the PHA's main point of contact for the RAD conversion(s). Only one user per PHA can have this designation. By default, the Primary PHA User is the point of contact listed on the online RAD application.
- **Request Financing Plan Extension:** User has the ability to submit an electronic request to HUD to request an extension to the Financing Plan due date.
- **Upload Documents:** User can upload documents for the Financing Plan submission, draft closing package submission, final closing docket, and Rehab/New Construction page.
- **Upload Post Closing Docs Only:** User can only upload documents to the Final Closing Docket page.
- **Write on PHA Pages:** User can input/edit comments and information about the PHA and converting projects. Without this checked, the user has read-only access and can view the information but cannot edit it.

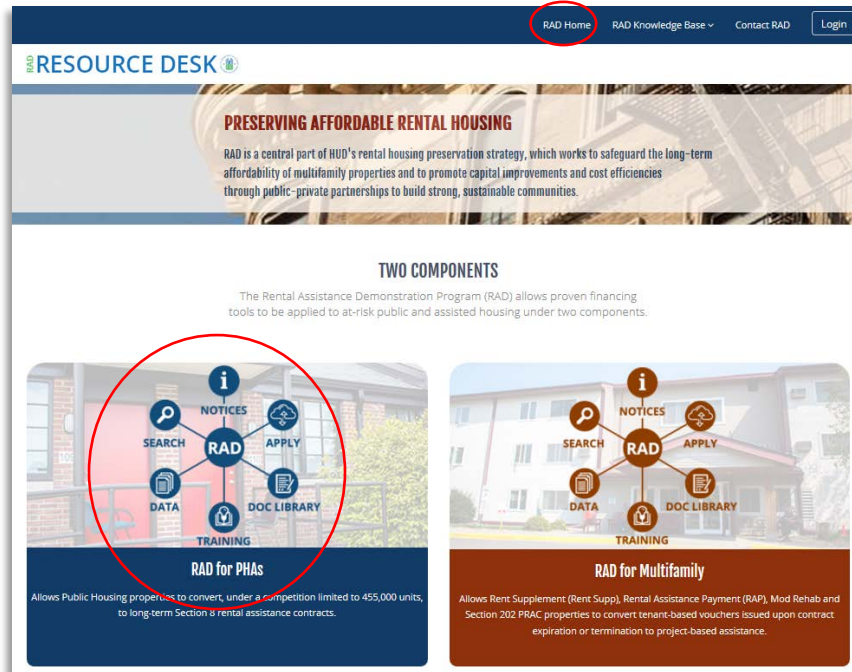
**Removing an Existing User.** If you wish to remove a user's RAD Resource Desk access, simply select the name of the user from the **User Administration** card, select **Inactive** and click **Update**. The user will no longer be able to login.



The screenshot shows a form with two sections. The first section is labeled 'Active Status:' and contains two radio buttons: 'Active' (which is unselected) and 'Inactive' (which is selected). The second section is labeled 'Approved:' and contains two radio buttons: 'Yes' (which is selected) and 'No' (which is unselected). Below these sections is a blue button labeled 'Update'.

## Part IV: The Document Library, Training (Webinars), Notices, and FAQs

Once logged in, click on **RAD Home**. From there you can navigate to the [Document Library](#) (**Doc Library**), [Training](#) (webinar), [Notices](#), and [Search](#) (FAQs). Note that these areas are publicly accessible so you do not have to be logged in to access them but some documents/webinars are viewable only to CHAP awardees and thus you must be logged in to access the full library.



**The Document Library:** CHAP awardees should spend some time familiarizing themselves with all of the guides and information found here. For example, there are specific guides for submitting Financing Plans, uploading Draft Closing Packages, submitting the Final Closing Docket, completing the Completion Certification requirement, information on the CNA and environmental reviews (including HEROS), RAD/Section 18 blend, EPC debt, resident relocation, etc.

**Trainings:** The Training section contains an archive of webinar walk-throughs (& corresponding slides) of prior RAD trainings by HUD staff. There are webinars on general information on the RAD program (“RAD 101”), how to navigate the RAD Resource Desk, information on submitting a Financing Plan, information on the RAD closing process, resident rights and relocation, etc.

**Notices:** This section is a document library of all RAD-related notices, including the current version of the RAD Notice and the RAD Fair Housing, Civil Rights, and Relocation Notice.

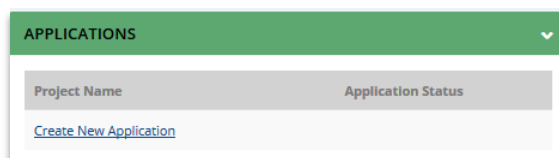
**Search:** This enables you to search the “RAD knowledge base” for existing FAQs and documents. You can opt to Search by Category, Search Questions by Date (for example, if you wish to see only the most recent FAQs), view all FAQs, or Ask a Question.

**Data:** This section provides publicly available data on the RAD for PHAs program, including a pie chart showing the number of units in various stages of conversion under RAD and the ability to extract more detailed data at the state/PHA or national level (see “Extra Data to Excel” feature). Additionally, State Fact Sheets can be downloaded here.

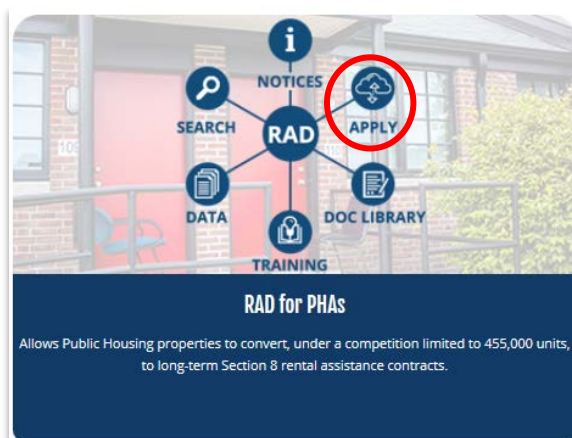
## Part V: Submitting an Application

As of September 10, 2018, all RAD applications must be submitted electronically via [www.radresource.net](http://www.radresource.net). Below you can find instructions on how to submit a RAD application.

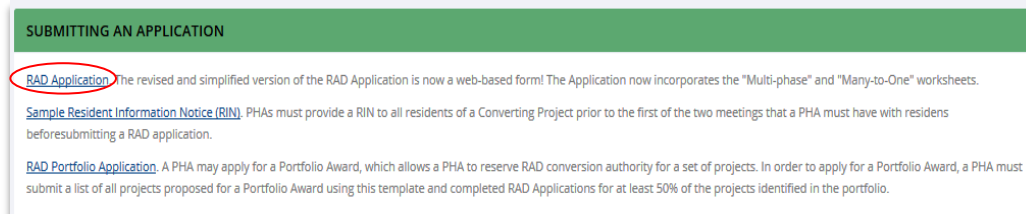
1. If your PHA already has an account on the RAD Resource Desk, follow the below instructions to complete and submit a RAD application:
  - a. Login to [www.radresource.net](http://www.radresource.net)
  - b. On your homepage, navigate to the **Applications** card and click **Create New Application**.



- c. Select the property that you wish to apply for from the dropdown menu and click **Start Application**. Note that if you intend to submit an application for a conversion which proposes to convert units from more than one PIC Development Number as part of a single RAD conversion (a “many to one”), you should select the project that will be contributing the most units. You will have an opportunity to input the information regarding the other properties within the application itself. If the property you wish to apply for is not shown in the dropdown list, email [resourcedesk@radresource.net](mailto:resourcedesk@radresource.net).
2. If your PHA is new to RAD and does not have an account on the RAD Resource Desk, follow the below instructions to complete and submit a RAD application. *Note: You will be prompted to login prior to being able to complete a RAD Application. If you do not currently have an active account associated with the PHA, you must create an account (& have your access approved) in order to be able to complete and submit a RAD application for the PHA. Contact [resourcedesk@radresource.net](mailto:resourcedesk@radresource.net) with any issues.*
  - a. From the main Resource Desk homepage, click the **Apply** icon.



- b. On the **Submitting An Application** screen, click **RAD Application**. On this screen you can also view a sample Resident Information Notice (RIN), which must be provided to residents prior to submitting a RAD application, and the template for submitting a Portfolio Award request should you wish to apply for a portfolio award in conjunction with your application submission.



- c. Select the property that you wish to apply for from the dropdown menu and click Start Application. Note that if you intend to submit an application for a conversion which proposes to convert units from multiple properties (a "many to one") you should select the project that will be contributing the most units. You will have an opportunity to input the information regarding the other properties within the application itself. If the property you wish to apply for is not shown in the dropdown list, email [resourcedesk@radresource.net](mailto:resourcedesk@radresource.net).

## Part VI: Quick Navigation Tips/Tricks

Below is how-to information on common website navigations. Many of the below items are covered in more detail in the above sections of this guide but are included below for ease of reference.

**Requesting Technical Assistance.** From your homepage, go to **Action Items** and then click **Request Technical Assistance**. You'll be prompted to input a brief explanation about what you require assistance on. Once you click **Submit**, HUD will assign a staff member to contact you.

**Logging the RAD PIC Removal Application DDA Number.** From your homepage, click on the name of the project. Then, click on Transaction Pages at the top > Financing Plan (PHA). You'll see a field on the page that says **PIC Removal Number (DDA#)**. Input the DDA number (it must start with "DDA") and then click Save. Email [sact@hud.gov](mailto:sact@hud.gov) and/or your PIH Field Office reviewers with any issues regarding the PIC removal application.

**Identifying Transaction Points of Contact.** At any time, you can view all internal and external parties assigned to your transaction via the Contact list. From your homepage, click on the name of the project. Then, click on Contacts. The first page of the PDF contains PHA parties and the second page of the PDF contains HUD parties.

**Requesting a CHAP Amendment.** From your homepage, click on the name of the project. Then, click on **Action Items** > **Request CHAP Amendment**. Input the reason for the request and attach all required supporting documentation. Click Submit. Consult the [CHAP Amendment Overview & Contract Rent Flexibilities](#) guide for information on CHAP amendments.

**Requesting a Financing Plan Extension.** From your homepage, click on the name of the project. Then, click on **Action Items** > **Request Financing Plan Ext.** On the next screen you'll see the current due date, a field for you to input the date you would like to extend it to, and a text box for you to input the reason for the delay. Click **Submit**.

**Updating Ownership Information for the RCC.** As part of your Financing Plan submission, you must populate information about the project's location and ownership. This section is found by clicking

into the name of the property > **Transaction Pages** > **Financing Plan (PHA)** > **Go To** > **Ownership Data for the RCC**. Once you have finished the section, click **Save and Confirm Data**. It is critical that this information is accurate as it flows directly into the RAD Conversion Commitment (RCC). More detail on how to complete this section can be found in the Financing Plan guides available in the [Document Library](#).

**Concept Call Checklist.** You must complete the Concept Call checklist prior to being able to request a concept call and submit a financing plan. The concept call checklist can be found by clicking on the property name and the Concept Call checklist transaction page will open. You can also navigate to it by clicking on **Transaction Pages** > **Concept Call Checklist**. More information on this can be found by viewing [this webinar](#).

**Information on Financing Plan submission requirements.** Detailed information on Financing Plan submission requirements can be found in one of the three Financing Plan guides available in the [Document Library](#). There is a guide for each financing structure – no/debt conventional, FHA with or without tax credits, and non-FHA tax credits.

**Getting help.** You can request Technical Assistance at any time via [www.radresource.net](http://www.radresource.net) (see above). If you are having login or technical trouble, you can also email [resourcedesk@radresource.net](mailto:resourcedesk@radresource.net).