**Learn how to use Housing Connect**

**House connect Training**

**Public Portal Intro**

* The Housing Connect public portal allows you to access affordable housing opportunities in New York City. These can be rental and homeownership opportunities. We have created a website where you can sign up, register, create a profile, apply and follow-up on applications to these housing opportunities.
* The home page provides useful information on housing opportunities across the five boroughs. You can also use the eligibility determination widget to browse for opportunities based on your household size and total household income.
* The results from browsing are displayed in a card format. Every card provides an overview of the development. This includes images of the development, the lottery deadline date, location of the buildings, number of units available, transit options, and more. You can click on details tab to view more information about the units advertised in the housing lottery, You can also click on the map to view the location of the housing opportunity.
* The about page on the website provides information and rules associated with the lottery process. There is a lot of useful information to know before and after you apply to a lottery made available through Housing Connect.

**Registration**

* Registration allows new users to sign up using the website. Click Register in the top right corner to access the registration page. The registration process begins by entering a unique username. The username can only include text and numbers. Make your username something you will remember for future log-ins. Following this, set up a password for the website. There are rules associated with password strength and these will be displayed to you when you place the cursor in the password field. Enter it twice correctly.
* After this, you will be required to enter your primary email where the account registration confirmation email will be sent. In addition, to ensure your security, we require a 2nd factor for authentication. This can be an alternate email or your cell phone number. Provide these details so that the 6-digit authentication code can be emailed or texted to you. Complete the registration by select the 2 checkboxes.
* At this point, an email notification will be sent to your primary email address. Please click the confirmation link and follow the instructions in the email for the 6-digit code.

**Account Setup**

* Open the email inbox you assigned as your primary email address. You will have received an email with a confirmation link. Click on the link. This will open a page to enter the 6 digit confirmation code to your cell phone or alternate email. Access you secondary contact method and copy the code sent there. Paste the copied value in the field for the code and click submit. This will complete the account setup.
* You can now login using your username and password. The first time you log-in, you will be asked to confirm your account information by entering your name. Make sure you hit save.

**House hold Setup**

* Household setup allows you to list the members that you want to live with. Following login, you will be taken here automatically if you have not already entered this information. Alternatively, you can also click the links in the top right corner to access this page.
* Your information is carried from the registration page. You can now specify the remaining members of the household and your relationship to them. You can add as many household members as you need.
* Click next once you are done and provide your current living address. This field includes an address locator. As soon as you input the street number and address, we will retrieve the matching results and display it. You will have to manually enter the apartment number.
* Household set-up will display one question at a time. Follow the prompts in the each set of questions and click Save in the bottom right hand corner at the end. This will take you back to the household summary page. Please note that the incomplete icons are showing because you still have to provide additional details for each household member.

**Personal Info**

Every household member must enter relevant personal details to complete your household profile. The process begins from the dashboard. Click on edit profile button next to each household member to be presented with the applicable questions. Respond to each question truthfully and accurately. Some questions have descriptions and links for more information to help you understand why each question is being asked. If you miss a mandatory question, you will be prevented from moving forward.

**Income Info**

* After you complete your personal details, you will be asked for income details. You can record multiple income sources for each member, Select the source that matches your income type and begin the questionnaire to respond one question at a time.
* A key part of recording income for each employer is the annual wages. You can indicate if you know your annual wages from your most recent tax filing. If you do, you will be required to submit the income based on the appropriate IRS Filing. If you do not have information from the tax filing, you can submit your estimated annual income.
* Please note that the income questions are an important part of the eligibility process, so you should take your time to make sure you answer them correctly. If you have specific questions, please review the FAQ section for answers. You can also go back change or update the employment details as needed.

**Asset Info**

* Once you have recorded your income details, you can add additional income details or, when you’re done, move on to recording assets. The questionnaire will walk you through the asset questions. Just like in income details, you can record multiple asset types for each household member. Examples of assets you can enter include checking accounts, savings accounts, retirement accounts, brokerage accounts, and investment accounts.
* You can also record any real estate you own. Alternatively, you can indicate that you do not have any real estate and complete the questionnaire for this household member.
* Please remember to repeat the personal, income and asset questionnaires for each member of the household to complete your profile.

**Housing Choices**

* Once you have the household details for each household member completed, you can indicate your housing choices. Housing Choices allows you to opt-into re-rental and re-sale housing opportunities, if you are interested. Housing choices will walk you through questions to record your criteria for re-rental/re-sale opportunities by neighborhood and unit types. Please note that your answers to these questions will determine what re-sale or re-rental opportunities you are considered for, so keep that in mind when determining how specific you want your answers to be.

**Search Refine**

* Housing Connect allows you to search for affordable housing opportunities made available using the website. You can search between rental and homeownership opportunities. Click on refine search to access options to narrow the results displayed. You can refine based on any one or a combination of these options, such as rent, income, household size, or neighborhood. Click search to show the results.
* You see the results displayed under the refine search button. You can clear the search results by clicking Clear Filter to see all of the available lotteries again.

**Apply to Lottery**

* Let’s now apply to a lottery. On the search page, all active lotteries are displayed in a card view. The card displays some project details without having to click and review the lottery in greater details. Remember that you are not applying for a specific unit, but rather, to the lottery which can consist of multiple unit types.
* The summary provides an overview of the development, the details provides the units offered and the map provides an aerial view where the housing opportunity is located.
* To apply to a lottery, click on the card to open the lottery advertisement. The available units & requirements table displays the unit details based on Household size and income. Review this list to ensure your household profile falls within the income bands of what is displayed here.
* To apply, click on Apply Now. This will display your Household Size and Income based on the profile questionnaire that you responded to. Check the terms and conditions and click submit. This completes your submission for the lottery.

**Document Upload**

* Housing Connect includes secure document storage that you can use at any time to upload documentation that is needed for all affordable housing opportunities. The idea is to maintain documents such as birth certificates, government IDs, and/or tax returns in the secure document store and use it on multiple applications.
* To access this feature, click on My Documents under your name. Locate the document you want to upload and give it a description so you remember what document it is. Click upload; now you document is safely and securely uploaded to your profile.

**My Applications**

* After you apply to lotteries on Housing Connect, you can always check the status of those applications. The best way to access your current application status or to know what is needed is to go to your dashboard.
* The dashboard provides simple and clear instructions on what is expected from you. You can review My Application Summary and check if any item is listed under Action Needed. The same items will also be listed under Messages.
* Click on them to find out the details. Action needed means you need to do something to move your application along. Examples could be a document needs to be uploaded, an appointment needs to be confirmed, or a unit offer needs to be accepted. You will see a label indicating exactly what is needed from you. Follow the prompts to complete the necessary action.

**Change Password**

To change your password or other account preferences, click My Account under your name. You can change your current password, your language preferences for receiving communications, and the methods for contacting you when authenticating key actions performed in the system.