Homeownership Capacity
Data Collection System (DCS)
User Guide

October 2021

Table of Contents

Introduction

The Homeownership Capacity Data Collection System (the "DCS") is a web-based data collection system designed specifically for the Homeownership Capacity Program (the "Program"). Homeownership Capacity Grantees (the "Grantees") are required to use the DCS to report on all households that enter the Program.

This Homeownership Capacity DCS User Guide outlines all the information Grantees will need to gain access, enter data, navigating the DCS for other tasks such as printing a summary of the Client data and sorting data to determine the date for subsequent Client follow ups, and how to report issues in the DCS.

All Program information on data collection, reporting, and documentation requirements related to the DCS can be found in the [Homeownership Capacity Manual](#) (the "Manual") which is located on the [Minnesota Housing](#) website.

Chapter 1 – The Homeownership Capacity DCS

1.01   Gaining System Access and User Privileges

Grantees must contact Minnesota Housing in the following situations:

- A staff person (existing or new) needs access to the DCS;

- A staff person who has access no longer needs access.

The Grantee's Program Manager must contact Minnesota Housing with the following DCS User information:

- Staff person's full name;

- Staff person's email address;

- Date to activate or deactivate access.

Once the staff person (the "User") has access, they will receive an email with log in instructions. All Users have the same access privileges. This means that all Users within the Grantee's organization will be able to access and can update data on any existing Client in the DCS.

1.02   Accessing the DCS

Once the User obtained access to the DCS, follow the screenshots below on how to log in to the DCS.

Once the User has logged in to the DCS, they may now complete any of the following:

- Add new Client and enter Intake data

- Enter data for any subsequent stage: Annual, Program Completion, Outcome, Client Stopped Communication

- Other DCS navigation

1.03 Program Performance Threshold Flow

There are multiple Program Performance Thresholds[1] where data may be collected. Each stage of the Client's progress through the Program is called a Program Performance Threshold or a Survey[2] in the DCS. The DCS is designed to release subsequent Program Performance Threshold only once the necessary information from the previous Program Performance Threshold has been submitted. For example, a User will only be able to access the Annual, Program Completion Data, Program Completion Client Survey or Client Stopped Communication Survey(s) once they have submitted all Intake data for that Client. All required fields must be completed before the User can successfully submit that Program Performance Threshold data.

See the Homeownership Capacity Program Manual ("the Manual") for reporting requirements. See below for the Program Performance Threshold flow established in the DCS.
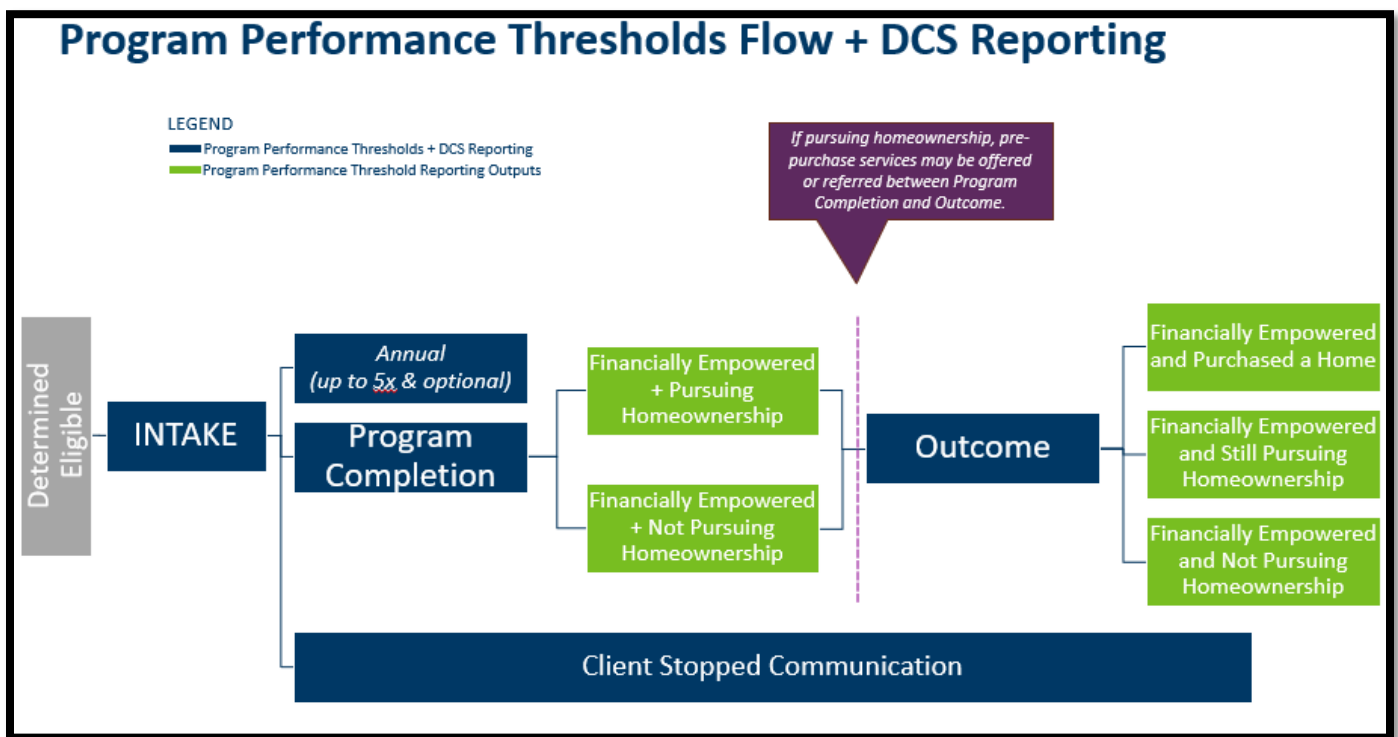
1.04 Add New Client and Enter Intake Data

Once the User has determined the Client met eligibility requirements, the User may add a new Client and the Intake data. Follow the screenshots below.

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[1] Refer to the Homeownership Capacity Program Manual, located on the Minnesota Housing website.

[2] Program Performance Thresholds is the term used for the Homeownership Capacity Program. Refer to the Homeownership Capacity Program Manual for more information. Survey is the term used for the DCS. They may be used interchangeably in this document.

1.05   Entering Subsequent Data

Refer to the Manual to ensure data is entered into the correct Survey and for other Client file reporting or supporting documents. Once the User had added a new Client and Intake data, they may access any of the following Surveys:

- **Annual Data**
  - o   This Survey is optional.
  - o   This Survey may be completed at any time or annually up to five times.

- This Survey does not need to be completed to access the Program Completion Data survey.

- **Program Completion Data**

  - The Program Completion Program Performance Threshold will appear after the Intake Program Performance Threshold data has been entered and completed.

    - Users may submit this Program Performance Threshold one time.

    - Follow the Manual for additional guidance.

  - Users will not be able to go back and enter Annual Data

- **Outcome Data**

  - The Outcome Program Performance Threshold will appear after the Program Completion Program Performance Threshold data has been entered and completed.

    - Users may submit this survey one time.

    - Follow the Manual for additional guidance.

- **Client Stopped Communication**

  - Refer to the Manual for the circumstances under which a Client should be entered as Client Stopped Communication.

  - Once the Client is entered as Client Stopped Communication, the User will not be able to access any Program Performance Thresholds.

To access this list of Program Performance Thresholds, follow the screenshots below:

The User will know they have completed all the required data entry when there are no additional Program Performance Threshold options to select.

Chapter 2 – Other DCS Navigation

2.01 Returning to the Survey History Page

At any time, the User may click Cancel to return to the Survey History page for their Client.

2.02 Printing the Client Summary

At any time after Intake data has been entered, the User can print a summary of the Client data that has been entered in the DCS. This can be a useful tool to share with the Client to demonstrate progress.

2.03 Returning to the Organization Page

The organization page is where Users will be able to access the full list of all Clients.

2.04 Sorting by Client Names or Dates

The DCS allows any column data to be sorted by either in ascending or descending order. This allows a User to sort by a Client's name or by date to determine which Client's require subsequent data entry in

the DCS.

2.05 Find a Client Name

To find a Client name, push the "Ctrl" + "F" key on your keyboard at the same time. A box will appear to enter the Client name.

2.06 Editing Data

Users do not have the ability to edit submitted surveys and must report edits to Minnesota Housing.

Common situations where edits are required:

- Data is entered incorrectly.

- The same Client is entered multiple times.

- A Client is entered as Client Stopped Communication but re-engages before the time that they can be counted as a new Client under the Program.

Users can request edits at any time. They do not need to wait until the end of the quarter. Users must report all errors by emailing HomeownershipCapacity.mhfa@state.mn.us with the following information:
- First two letters of the Client's last name, first two letters of the Client's first name
  - Do not include the Client's full name.
- Intake date
- A description of the issue

Please see below for a few samples:
- **Data is entered incorrectly**
  - Client Name: Jo…, De…
  - Intake Date: 04/02/2018
  - The credit score at Intake needs to be changed from 642 to 624

  - Client Name: Hu….., Ma….
  - Intake Date: 04/06/2018
  - The Program Completion survey was submitted in error. Please remove this survey.

- **The same Client is entered multiple times**
  - Client Name: Va…., Br…..
  - Intake Dates: 01/02/2021 and 01/09/2021
  - This Client is a duplicate Client in the DCS. Delete this Client's 1/9/2021 entry.

- **A Client re-engages after being entered as Client Stopped Communication but before they can be counted as a new Client under the Homeownership Capacity program**
  - Client Name: An….., No….
  - Intake Date: 04/03/2021
  - The Client Stopped Communication survey needs to be removed as this Client has re-engaged and cannot yet be counted as a new Client.

Minnesota Housing program staff can complete most edits in the DCS. If the edit can be made by program staff, you will receive a response to your email once the edit has been completed.

Often edits need to be made with the assistance of Minnesota Housing's technology information department. In these instances, a list is maintained and submitted on a quarterly basis. You will be notified via email if the edit requires this additional assistance. Once all edits are completed by technology information department, all contacts for your organization will receive a spreadsheet with each requested edit and the date the edit was completed. This will be sent via the Single Family Secure File Exchange, LeapFile.

2.07　　　　Logging Out

To log out of the system, click Log Out in the upper right hand corner of any screen. After 15 minutes of inactivity, the DCS will automatically log the User out. If the User has not already submitted data, the data in any survey that is partially completed will be lost.
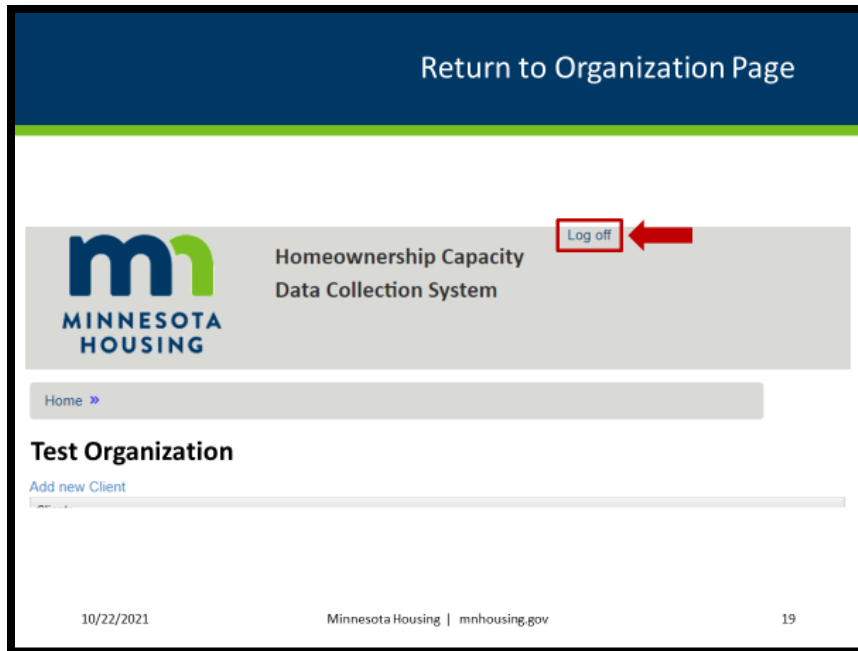
2.08　　　　Reporting DCS Issues

To report any issues with the DCS, send an email describing the issue to HomeownershipCapacity.mhfa@state.mn.us. If any personally identifiable information (PII) on a Client must be included, only include the first two letters of the first name and the first two letters of the last name as well as the Intake date. The full Client name should not be included.