

CLT Stewardship

Tracking Data
when your needs exceed a
spreadsheet...



HomeKeeper Homeownership Features

- **Property Portfolio Management:** Track program properties, loans and subsidies.
- **Manage Applications and Intake:** Track applicant data and status, including demographics, application and purchase workflows and eligibility certification.
- **Post-Purchase and Resale tracking:** Owner monitoring and compliance activities, manage resales and program exit surveys.
- **Measure Impact:** Through standard metrics, and Social Impact Reports from the HomeKeeper National Data Hub



Create New...

Property 1345 Martin Luther King Blvd

Customize Page | Edit Layout | Printable View | Help for this Page

Recent Items

- 1345 Martin Luther King Blvd
- Wei - Assistance
- 2017 Neighborhood Housing Grant
- Barela, Thomas and Julia Jacobson
- Thibault, Nancy and Lonnie Jones Applicant 2013
- Howard, Yaphet and Tiffany
- Valerie Rogers
- 2018-07 FHTB

Appraisals [1] | Assessed Values - Property Taxes [0] | Services [1] | Development Costs [0] | Improvements & Adjustments [0] | Open Activities [0] | Monitoring Events [0] | Housing Opportunity Allocations [3] | Fees [0] | Activity History [0] | Notes & Attachments [0]

Property Detail

Edit Delete Clone

Property Address	1345 Martin Luther King Blvd	Purchase Price	\$115,000.00
City	Hubbarston	Planned Number of Units	1
State	MA	Total Development Costs	\$0.00
Zip/Postal Code	01454	Total Improvements & Adjustments	\$0.00
Source of Home	New construction	Total Allocations	\$23,000.00
Partnership			
Date Placed in Program	12/5/2014		
Staff Notes			

Track Basic Property information including location and purchase price

Custom Links

[Review National Roll-Up Data](#) [Zillow](#) [Map](#)

Photo

Property Photo Image URL <https://c.na15.content.force.com/servlet/servlet.FileDownload?file=00Pi0000000Zt9vm>

Property Status

Status **Owner Occupied** Homeowner **Miguel Castillo**
 Tenure Type **Lease Purchase** Co-Owner **Sarah Castillo**
 Current Program Fees **Castillo, Miguel**
 Current HOA/Condo Fees

Property Value

Unrestricted Market Value **\$130,000.00** Original Unrestricted Market Value **\$130,000.00**
 Appraised Leasehold Value **Original Appraised Leasehold Value**
 Assessed Value **Original Assessed Value**



No records to display

Application Household Members

[New Application Household Member](#)

[Application Household Members Help](#)

Action	Household Member ID	Name	FT/PT Household Member	Application Role	Birthdate	Age	Include In Service File HH Size
Edit Del	HMID - 04112018-0090	Eddie Ramanathan	Full Time	Primary Applicant	12/15/1945	72	<input checked="" type="checkbox"/>
Edit Del	HMID - 12062017-0066	Sarah Ramanathan	Full Time	Co-Applicant	10/3/1967	50	<input checked="" type="checkbox"/>

Income Sources

[New Income Source](#)

[Income Sources Help](#)

Action	Income Source Number	Wage Earner	Income Type	Gross Annual Income	Eligibility Adjustments	Year of Income	Do Not Include In Eligibility Income	Income Calculations
Edit Del	IS-00033	Eddie Ramanathan	Full-time Employment	\$30,000.00		2,017	<input type="checkbox"/>	
Edit Del	IS-00037	Sarah Ramanathan	Part-time Employment	\$10,000.00		2,017	<input type="checkbox"/>	

Assets

[New Asset](#)

[Assets Help](#)

Action	Asset Name	Type	Value	Have Access Now
Edit Del	Savings	Savings	\$3,530.00	<input type="checkbox"/>
Edit Del	Checking	Checking	\$1,240.68	<input checked="" type="checkbox"/>
Edit Del	IRA	Investment Account	\$12,000.00	<input type="checkbox"/>
Edit Del	Investments	Investment Account	\$5,050.00	<input type="checkbox"/>

See Homeowner snapshots in a single view

Debt

[New Debt](#)

[Debt Help](#)

Action	Debt Number	Payee	Balance Due	Monthly Payment
Edit Del	D-00003	Student Loan	\$25,000.00	\$500.00
Edit Del	D-00004	Student Loan	\$4,860.00	\$124.58

Funding Sources

[New Funding Source](#)

[Funding Sources Help](#)

Action	Source Name	Amount	Funding Source Type	Housing Opportunity	Status	Payoff Date
Edit Del	Downpayment Assistance	\$10,000.00	Loan (Purchase)		Current	

Counseling/Education

[New Counseling/Education](#)

[Counseling/Education Help](#)

Action	Counseling Number	Counseling/Education Detail	Status	Session Start Date	Group Session	Group Education Attendee Contact	Purpose of Visit	Counselor
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Comment · Like · April 11, 2018 at 3:13 PM

[Service File History \[2\]](#) | [Open Activities \[0\]](#) | [Application Household Members \[2\]](#) | [Income Sources \[2\]](#) | [Assets \[4\]](#) | [Debt \[2\]](#) | [Funding Sources \[1\]](#) | [Counseling/Education \[3\]](#) | [Log Items \[4\]](#)

Service File Detail

[Edit](#) [Delete](#) [Update Status](#) [Certify Income](#) [Clone Household, Demographic & Income Information](#)

Service File Name **Ramanathan, Eddie 1-1 Counseling 2017**

Applicant [Eddie Ramanathan](#)

Co-Applicant [Sarah Ramanathan](#)

Formal Greeting

Informal Greeting

Program

Staff Notes

Custom Links [Enter Applicants](#)

[Copy Address to Contacts](#)

Certify income at a certain point in time

Qualifying Information

Most Recent Income Year 2017

Household Size 2

Number of Dependents 0

Annual Income (Gross) \$40,000.00

Annual Income (Eligibility) \$40,000.00

AMI for Household Size \$64,000.00

Percent of AMI (Gross) 62.50%

Percent of AMI (Eligibility) 62.50%

AMI [2017 Mississippi County AMI](#)

Maximum Allowable Percent of AMI 80.00%

Calculate clients % of AMI

Certified Household Size 2

Certified Annual Income (Gross) \$40,000.00

Certified Annual Income (Eligibility) \$40,000.00

Certified AMI for Household Size \$64,000.00

Certified Percent of AMI (Gross) 62.50%

Certified Percent of AMI (Eligibility) 62.50%

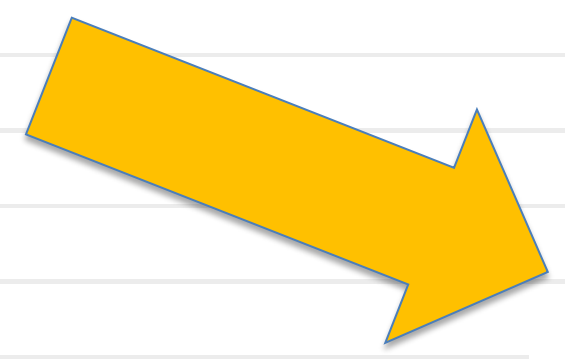
Certified Eligibility Income Calculation

Total Assets \$21,820.68

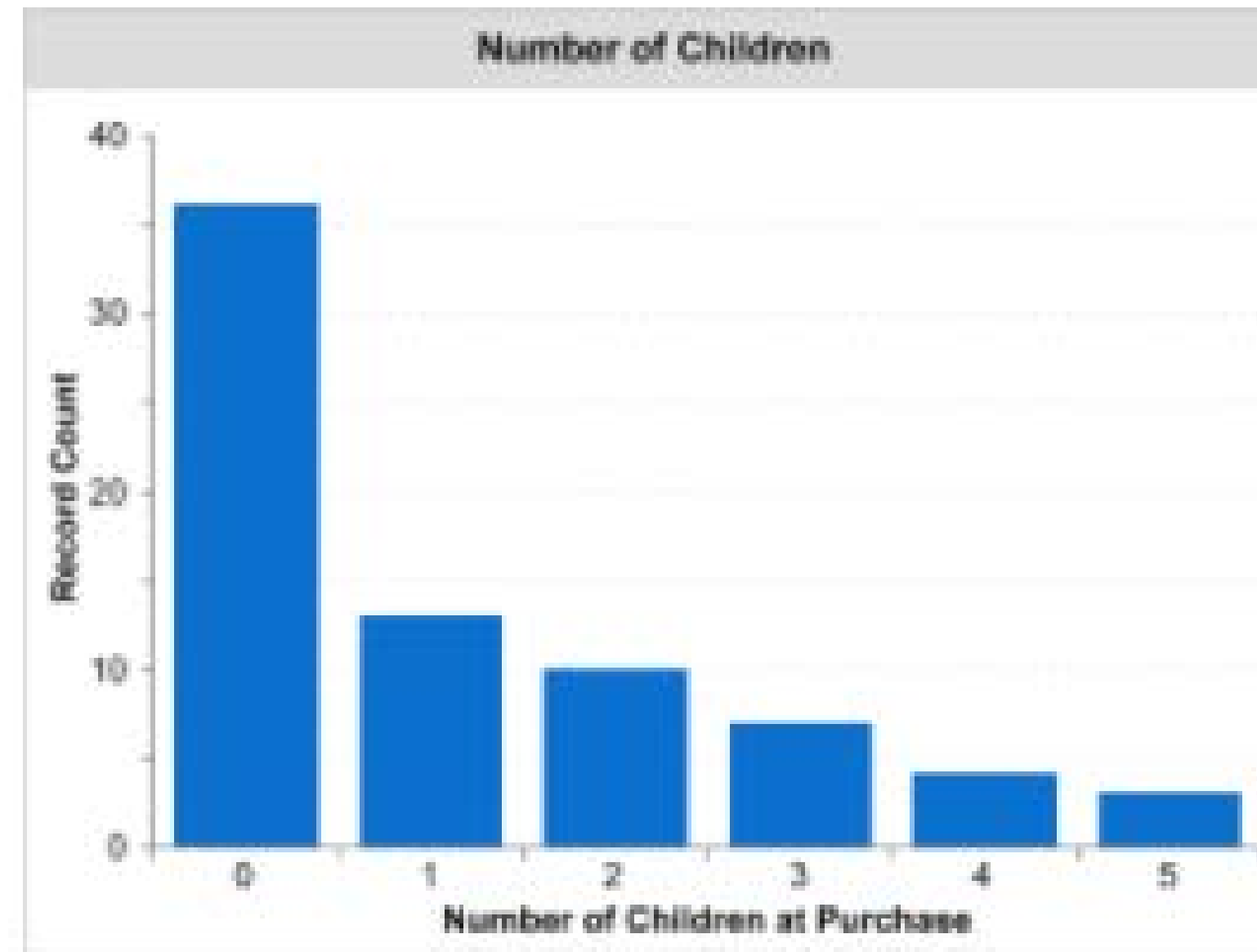
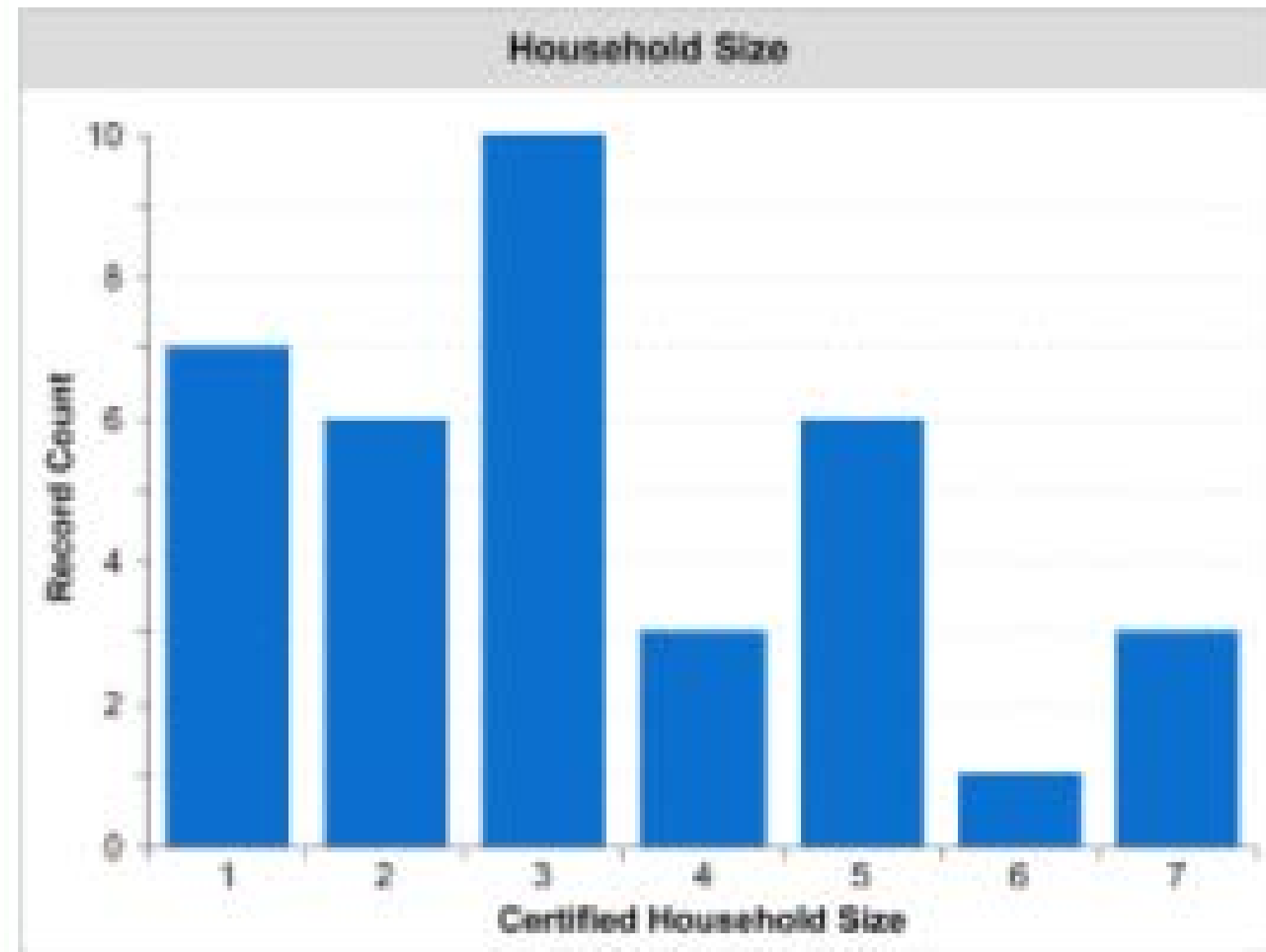
Total Available Assets \$1,240.68

Total Debt \$29,860.00

Total Monthly Debt Obligations \$624.58

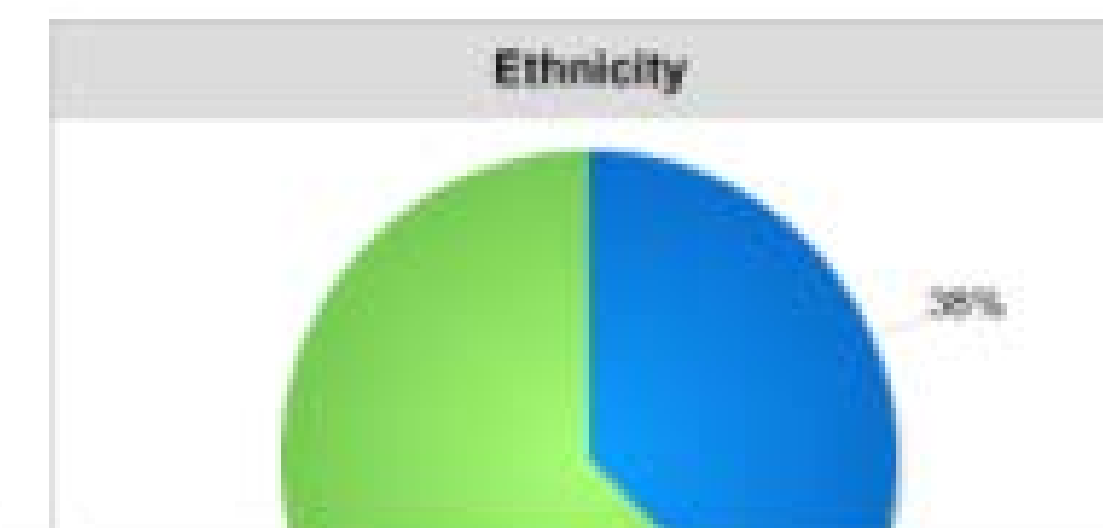
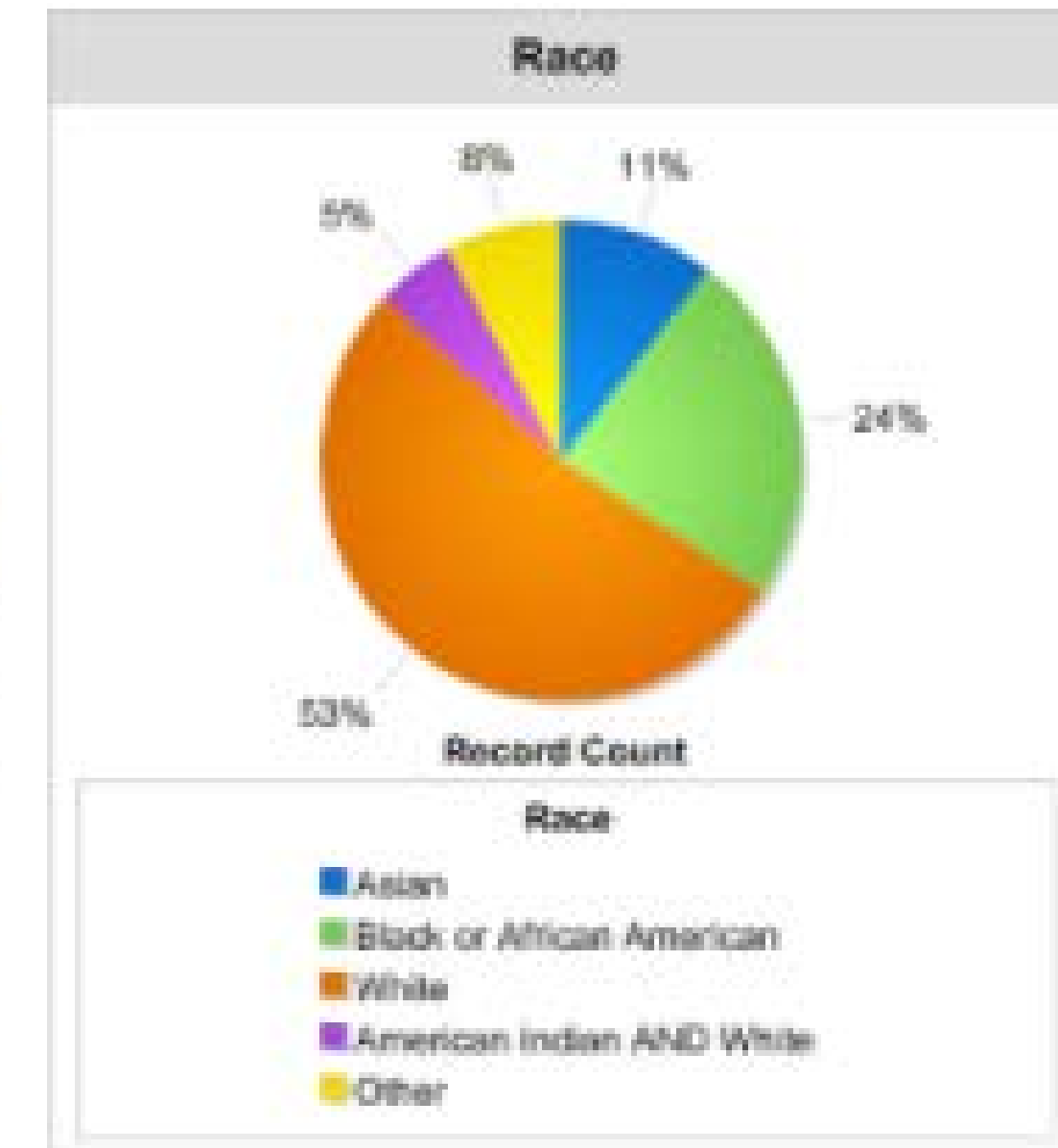
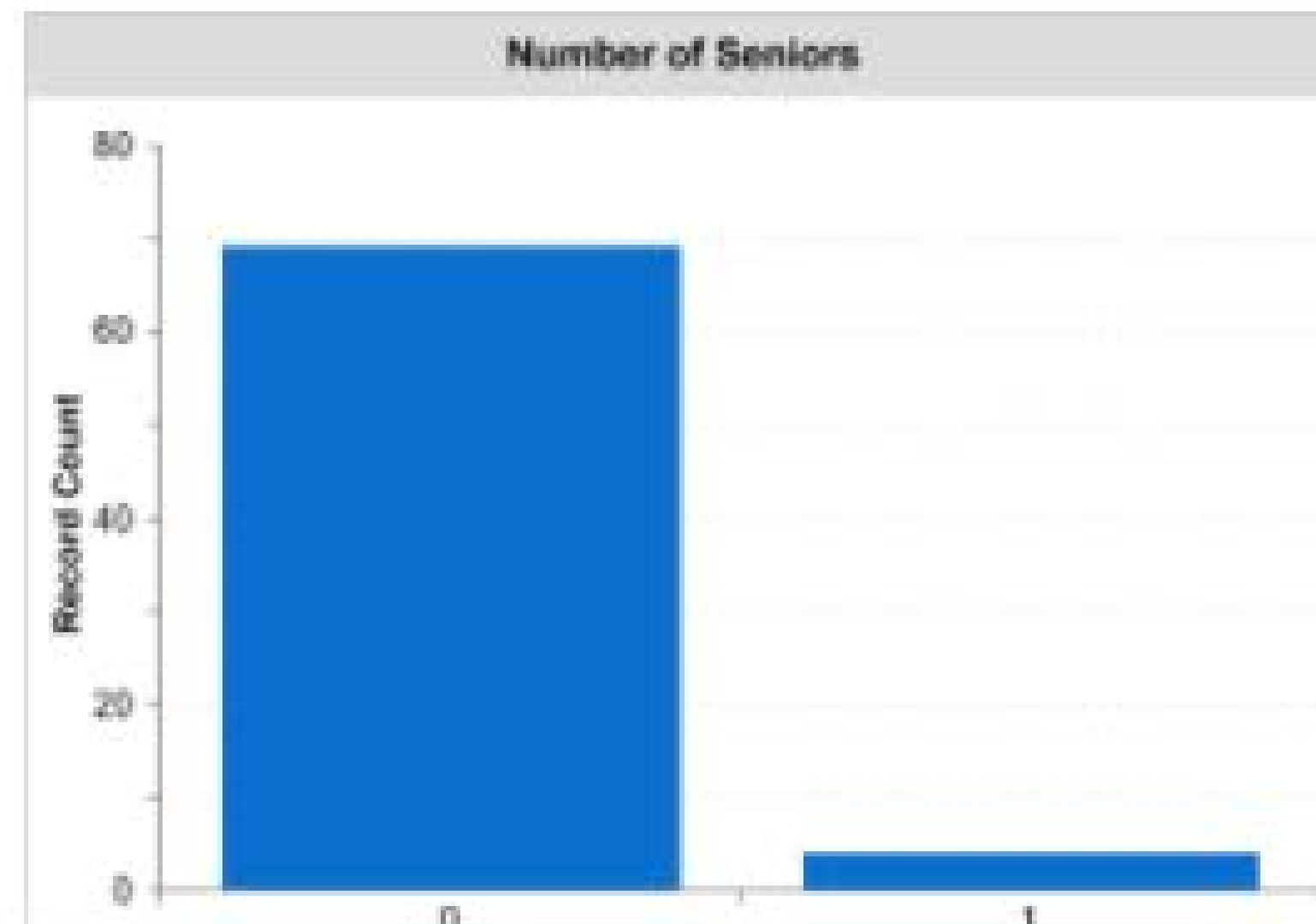


This is the dashboard for Habitat for Humanity Tulsa's Demographics which can be reported to International.



Averages at Time of Purchase

Average Household Size:	3
Average Age of Applicant at Purchase:	36
Average Number of Children at Purchase:	1
Average Number of Seniors:	0



FREE Data Management Tools

- Data Collection Checklist
- Property Portfolio Management Spreadsheet
- Event Monitoring Log
- Exit Survey Log
- Universal Application

These can be used stand alone or to make future Homekeeper data migration a more seamless process.



Free Data Management Tools

Have you outgrown your paper systems? Improve your data management today!

Here are free tools you can start using today to get you on the path to better data management and faster reporting. Whether you're ready to become a HomeKeeper member next month or next year, these easy-to-use tools will help you implement best practices now.

All of these tools will make future Homekeeper data migration a more seamless process. With more organized data and complete records, you'll be able to generate more accurate and more robust reports.

- [Data Collection Checklist](#) – A data management checklist developed by peer permanently affordable housing organizations based on data collection best practices. With practitioners collecting the same data in the same way, we can more accurately measure the impact of the sector at national level.

PROPERTY PORTFOLIO WORKSHEET

Property Address	City	State	Zip	Status	Census Tract	Date Placed in Program	Green Building Features	Description of Green Features	Number of Bedrooms	Square Footage	Year Built	Development	Neighborhood
555 Main Street	Washington	MA	2158	Owner Occupied		1/1/2015	TRUE	Runoff Dra	2	1100	1988	Rainhill	Edro Isle
666 Main Street	Washington	MA	2159	Owner Occupied		1/2/2015	TRUE	Runoff Dra	2	1100	1992	Rainhill	Edro Isle
777 Main Street	Washington	MA	2160	Owner Occupied		1/3/2015	TRUE	Runoff Dra	3	1200	2011	Rainhill	Edro Isle

Sign Up

- [Become a HomeKeeper Organization](#)
- [2018 Training and Support Schedule](#)
- [Free Data Management Tools](#)

Next Steps

- [Take our Data Management Self-Assessment](#)
- [Free Data Management Tools](#)
- [Attend an orientation webinar](#)
- [Take a test drive](#)

Interested in HomeKeeper?

- Check out HomeKeeper's website at www.MyHomeKeeper.org
- Contact Valerie Rogers at vrogers@groundedsolutions.org to ask questions about HomeKeeper or setup a personalized demo for your organization

** We currently have grant funds to cover the onboarding cost of HomeKeeper for shared equity programs. Contact Valerie to learn more and see if your organization qualifies!*

