Regional Housing Legal Services

Request for Services

User Guide

Contents

Purpose and Background

Regional Housing Legal Services (RHLS) launched the Request for Services System in December 2014. The new system includes two key improvements over our previous system: 1) it allows users to save a partial application and to come back and revise before submitting; and 2) it only requires organizations to input organizational information once a year. The new system also collects additional information that RHLS is required to submit to its funders and makes it easier for RHLS attorneys and administrative staff to process the documentation required by funders.

This User Guide walks you through the new system and includes screenshots to help orient you.

Registering with the Request for Services System

You can access the Request for Services System by going to www.rhls.org/request-services.

The first time you access the system you should click on "create account."

> **Request Services**
>
> To request legal services from RHLS, you must utilize our online Request for Services System. We recommend that you download and refer to our User Guide to help you get familiar with the system.
>
> - If you are new to the system, please create account
> - If you have already created an account, please log in
>
> If you are having trouble accessing the Request for Services System, send an email to info@rhls.org. Make sure your email uses the subject like "RHLS Request for Services" and includes your name, your organization, and a detailed description of your problem.

Creating a User Account

To create your User Account you must complete all of the fields on the form.

Instructions

To use the RHLS request for services system, each user must have a user account. You create that account on this page. If you already have an account, you should log in. If you cannot remember your password, you can have it emailed to you.

Once you have created your user account you will be taken to a page to create your organizational profile. You must complete at least the required information in the organizational profile before you logout or navigate away. You can come back and edit the information later. If you do not complete at least the basic organizational information your account will not be created.

First Name *

Last Name *

Email Address *

Password *

Confirm your password *

Name of Organization *

Security code

R2PGL

Enter code *

Submit

After completing your User Account you will be taken to the log in screen. ***<u>You must log in and complete at least some organizational information and save the form to properly create your account</u>***.

RHLS
Regional Housing Legal Services

Log into the RHLS request for services system

Email   ✳

Password   ✳

Login

Created with Caspio

Need an account? Create Account

Forgot Password?

In future visits you can go directly to the Log In screen to get started.

Creating an Organizational Summary

All of the fields on the Organizational Summary page are required fields – whether or not the field has a red asterisk (*****). We elected to make very few of the fields programmatically required fields (with the red asterisk (*****)) because it increases your flexibility to enter some data and then come back and enter additional data at a later time. Because we will not review or your Organizational Summary until you submit a completed Request for Services, you can feel free to

include placeholder answers – just make sure to make sure all of the information is correct before you submit it for review.

After you save your Organizational Summary you will be taken to the Main Menu. From the Main Menu you can view/edit an existing request for services, add a new project/request for services, edit your Organizational Summary, access this User Guide, or logout.

Creating a Request for Services

As with the Organizational Summary, you must complete at least the required information before you save a draft of your Project. You can come back later and add additional information later. To save your work you must click "Submit". If you have fully completed the form, you should click the checkbox next to "click this only if your submission is complete " and then click "Submit".

Request services for a new project.

This form must be fully completed. Every field is a REQUIRED field. If you do not fully complete this form it may delay our review or result in a denial of your request for services.
This system is designed so you can complete the request for services in stages, if needed. We will ONLY review your request once you click the box at the bottom of this form indicating that your submission is ready for review.

Section 1 - Project Description

Project title

In what county is the project located?

Adams ▼

Type of project

Low Income Housing Tax Credit - New ▼

If the project includes non-housing development, list the total sq. ft. here

When you are ready, you must click the box after the question "Is this project ready for review by RHLS?" before you click "Update".

What day would you like a response by? (we usually review requests within two weeks)

7/12/2013

Is this project ready for review by RHLS? (check if Yes)

Update   Back

Record   1   of 3 ▶ ▶|

Editing your Organizational Summary

Editing your Organizational Summary allows you to make changes to previously saved information. We will not review your Organizational Summary until you create and properly submit a Request for Services. Once we have reviewed and accepted one Request for Services, you will not need to change your Organizational Summary until you have updated financial information (generally the next year).

Although not every field is listed as required with the red asterisk (*), _**all fields are required for our review**_. If you do not fully complete any of the forms you will be asked to complete and resubmit or your request may be rejected due to insufficient information. Please complete all of the fields in both the Organizational Summary and the Project Profile.

Organizational Summary

Name of Organization	RHLS
Organization Street Address *	2 S Easton Road
Organization Street Address 2	
Organization City *	Glenside
Organization State *	Pennsylvania
Organization Zip Code *	19123
Organization Phone Number *	2155727300
Organization Website	
Organization and Financial 1 org datefincorporation	05/20/1999
Organization FEIN	
Membership Organization? *	○ Yes ○ No
Is the organization's principal activity serving people whose household incomes are at or below 125% of the federal poverty level (approx. 20% of AMI)? *	● Yes ○ No
Is the organization's principal activity serving or furthering the interests of people whose household incomes are at or below 187.5% of the federal poverty level (approx. 30% of AMI) *	● Yes ○ No

View Existing Project Profiles

Clicking on "View/Edit Project" brings up a screen with all of your entered Project Profiles, including information about whether the project has been submitted for review and when it was last edited. If you want to view more detail or make edits to a Project Profile, click on "View Details" next to the project you want to view/edit. Make sure to click "Update" when you are done editing.

Click on "View Details" to review project details

Project title	Submitted for Review?	Last Edited	
july test	No	07/08/13	➡ View Details
test after change 2 fields to authenticated	No	07/10/13	➡ View Details
Test project (Aug 30)	No	08/30/13	➡ View Details
Testing	Yes	11/21/14	➡ View Details
test to confirm association - existing account	No	12/26/14	➡ View Details

Records 1-5 of 5

If you have finished you work and want to submit the application for review, make sure to click the box after the question "Is this project ready for review by RHLS?" before you click "Update".

What day would you like a response by? (we usually review requests within two weeks)

7/12/2013

Is this project ready for review by RHLS? (check if Yes)

☐

Update   Back

Record   1   of 3   ▶ ▶|

Logging Out

Whenever you finish a work session, please make sure to Log Out. A Log Out button is available on Main Menu and on each page of the application.

User Management

RHLS's Request for Services System allows users to create accounts tied to their organizational email accounts. Our system does not allow users to access the information submitted by other users. We strongly suggest that organizations applying to RHLS for legal services coordinate their account creation and information submission activities.

We have created a process for recovering passwords. The password recovery system requires access to the email address that created the account.

If you have a special problem or concern, email info@rhls.org with the subject line "RHLS Request for Services".

RHLS's Process for Reviewing Requests

RHLS tries to review requests for services within two weeks of receiving them. RHLS will not review incomplete request. If you receive an email from RHLS requesting additional information, you will need to provide the updated information before RHLS will review the request.

RHLS receives funding from a variety of sources, each with different requirements. This means that RHLS has to collect information about the services it provides and the clients it serves covering a range of topics. It also means that some types of projects will have limited funding available to support that type of work. Currently, we have the most funding available to support organizations that could not otherwise afford legal services and who focus their efforts on low and extremely-low income households. Our strategic priorities and our current case load influence which cases we can accept at any particular time. Our current strategic priorities are: 1) affordable rental housing creation and preservation for very-low income households, including vulnerable populations; 2) stabilization of homeownership; 3) community-driven redevelopment activities; and 4) projects that require special expertise, helping to lead the field.

Getting Help

If you need additional help, email info@rhls.org and use the subject line "Request for Services System". We will respond to your inquiry as soon as we are able.