

Participant Information Management System (PIMS)

User Manual

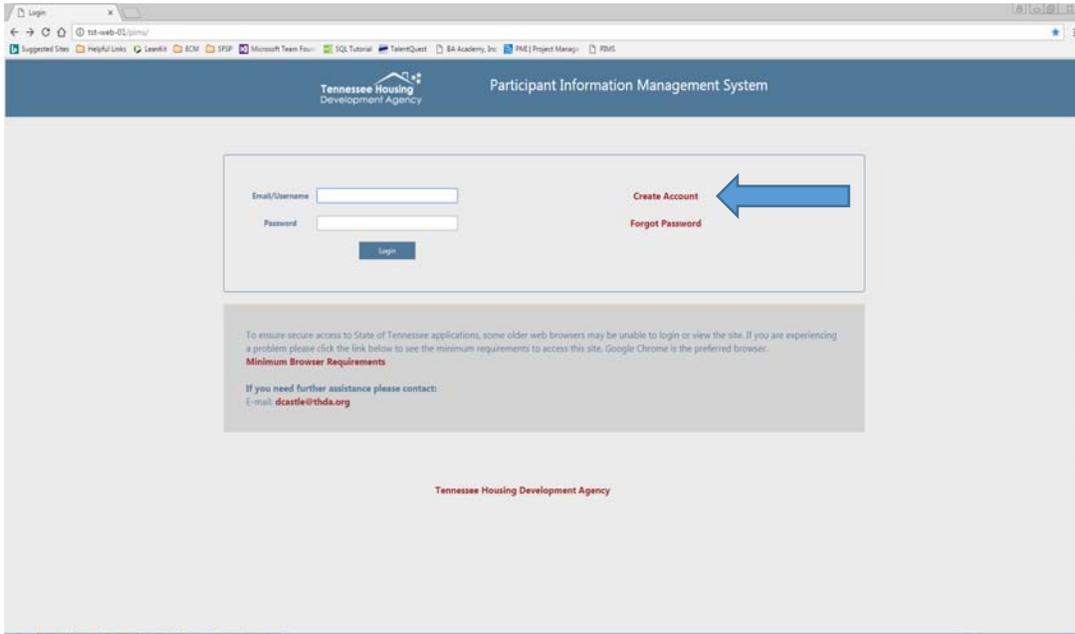
**Andrew Jackson Building Third Floor
502 Deaderick St., Nashville, TN 37243**

**For assistance contact:
PIMS@THDA.org**

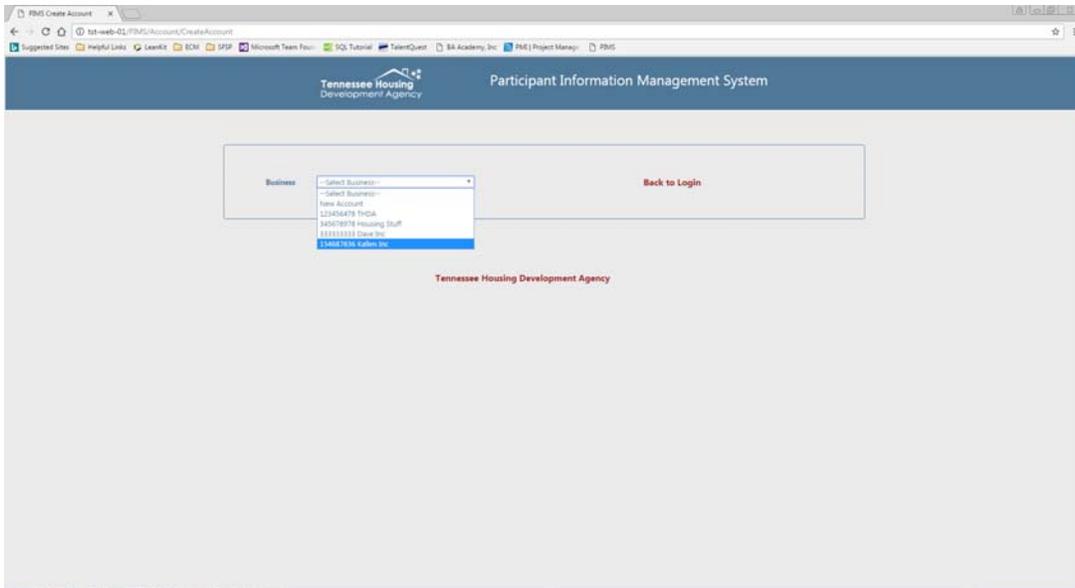
Create Account:

1. Go to <https://resources.thda.org/pims>

2. Click Create Account



3. For New Account- Select New Account from drop down list.
For Existing Account- Select appropriate business name.



The first account created will automatically be designated as the manager for that business.

4. **New accounts answer the eligibility questions as seen below. Existing accounts skip to step 5.**

Business: [Back to Login](#)

All questions must be answered.

Yes No Was your entity created under the laws of Tennessee or another state as a non-profit organization?

Yes No Is this entity qualified to do business in the State of Tennessee?

Yes No Is this organization currently an S-03(c)(3) or S23(c)(4) entity?

Yes No Do the bylaws of the entity specify 'affordable housing and related activities' as a primary purpose of the organization?

Yes No Has the entity been engaged in the business of affordable housing and related activities for at least two years in the State of Tennessee OR is the entity a Tennessee housing counseling agency, OR is the entity a land bank in the State of Tennessee?

Tennessee Housing Development Agency

5. **Fill out all the following information. All fields are required. If using an existing business account the business name and EIN will be prepopulated.**

Business: [Back to Login](#)

All fields are required.

First Name:

Last Name:

Email Address:

Phone Number:

Business Name:

Tax ID:

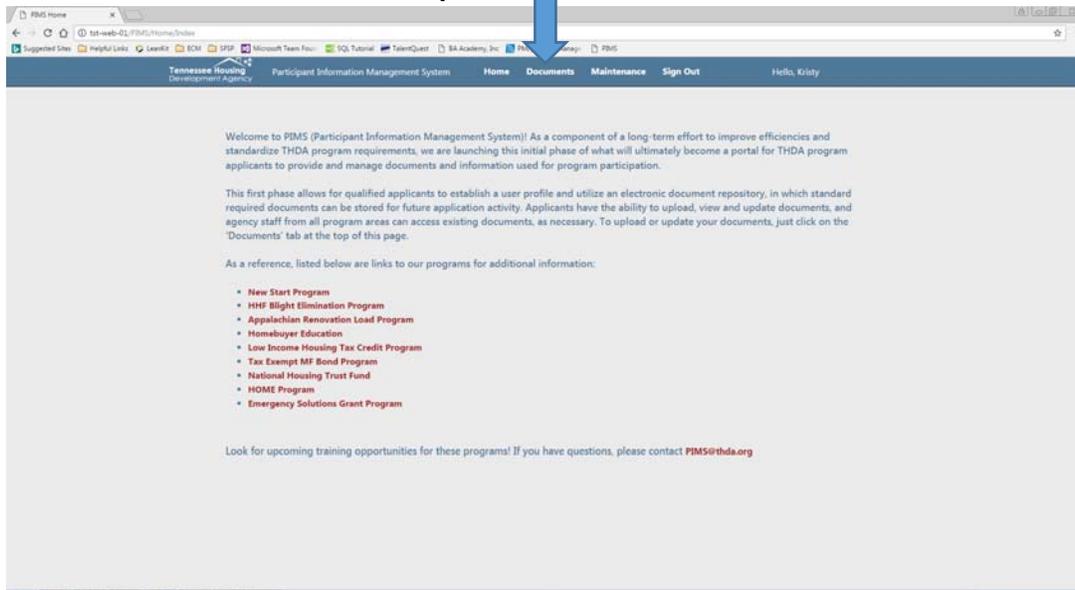
Tennessee Housing Development Agency

6. **Click Submit. Once you have submitted your information, your account will be reviewed by a THDA staff member. Upon approval you will receive an e-mail with a temporary password and a link to establish your login password. If using an existing business account the manager for that business will approve the account.**
7. **Enter your temporary password, and create your new password, following the required criteria. You will immediately be redirected to the login page, where you can enter the application using your email address (user name) and new password.**

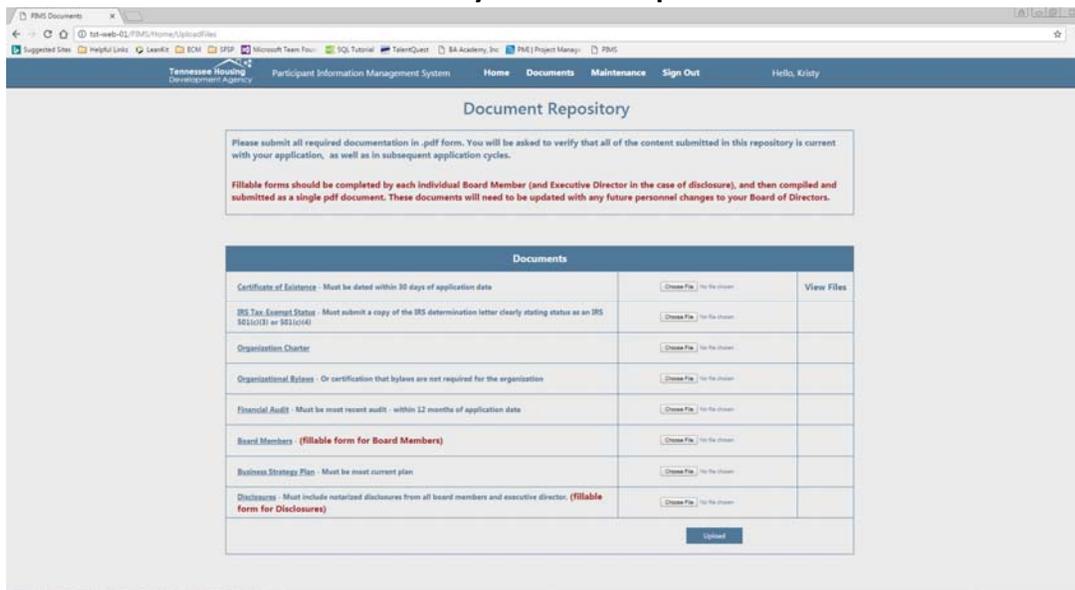
Uploading Documents:

Please submit all required documentation in .pdf form. You will be asked to verify that all of the content submitted in this repository is current with your application, as well as in subsequent application cycles.

1. Click on the Documents tab at top of the screen.



2. Click Choose File for the document you want to upload.



3. Select file from your computer to upload.

4. Click Upload. Document will not be uploaded to the system until you click upload.

Fillable forms should be completed by each individual Board Member (and Executive Director in the case of disclosure), and then compiled and submitted as a single pdf document. These documents will need to be updated with any future personnel changes to your Board of Directors.

Viewing Uploaded Documents:

1. Click View Files next to the document you want to view.

Document Repository

Please submit all required documentation in .pdf form. You will be asked to verify that all of the content submitted in this repository is current with your application, as well as in subsequent application cycles.

Fillable forms should be completed by each Individual Board Member (and Executive Director in the case of disclosure), and then compiled and submitted as a single pdf document. These documents will need to be updated with any future personnel changes to your Board of Directors.

Documents		
Certificate of Existence - Must be dated within 30 days of application date	Choose File for this document	View Files
IRS Tax Exempt Status - Must submit a copy of the IRS determination letter clearly stating status as an IRS 501(c)(3) or 501(c)(4)	Choose File for this document	
Organization Charter	Choose File for this document	
Organizational Bylaws - Or certification that bylaws are not required for the organization	Choose File for this document	
Financial Audit - Must be most recent audit - within 12 months of application date	Choose File for this document	
Board Members - (Fillable form for Board Members)	Choose File for this document	
Business Strategy Plan - Must be most current plan	Choose File for this document	
Disclosures - Must include notarized disclosures from all board members and executive director. (Fillable form for Disclosures)	Choose File for this document	

[Upload](#)

2. Click on the file name under Downloaded to view document.
The last uploaded document will be listed first.

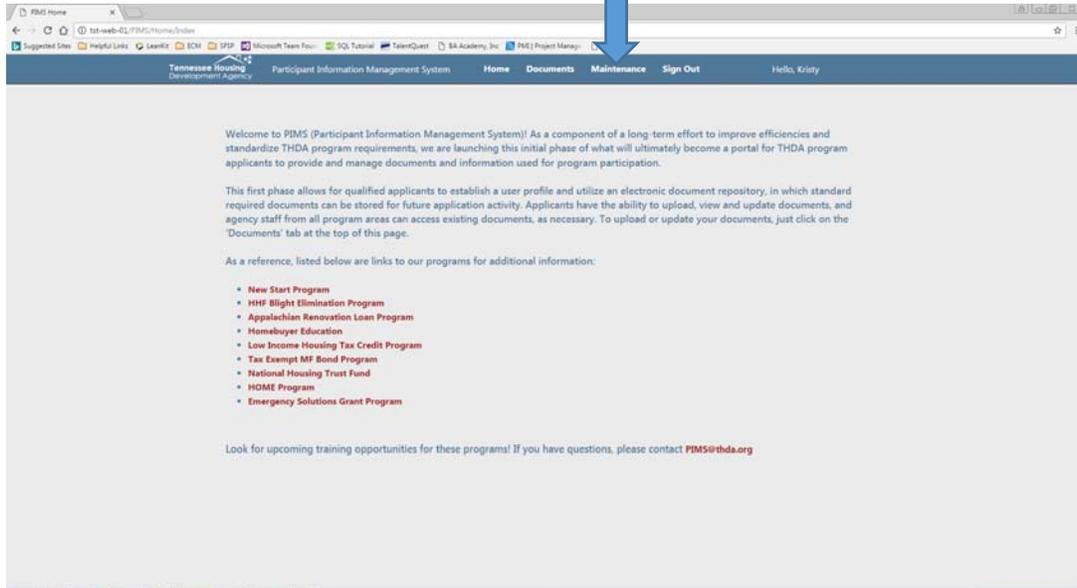
Certification of Existence

Sent	Sender	Download
12/01/2016	Kristy Allen	COE_kallen.12012016140629.pdf
12/01/2016	Kristy Allen	COE_kallen.12012016123259.pdf

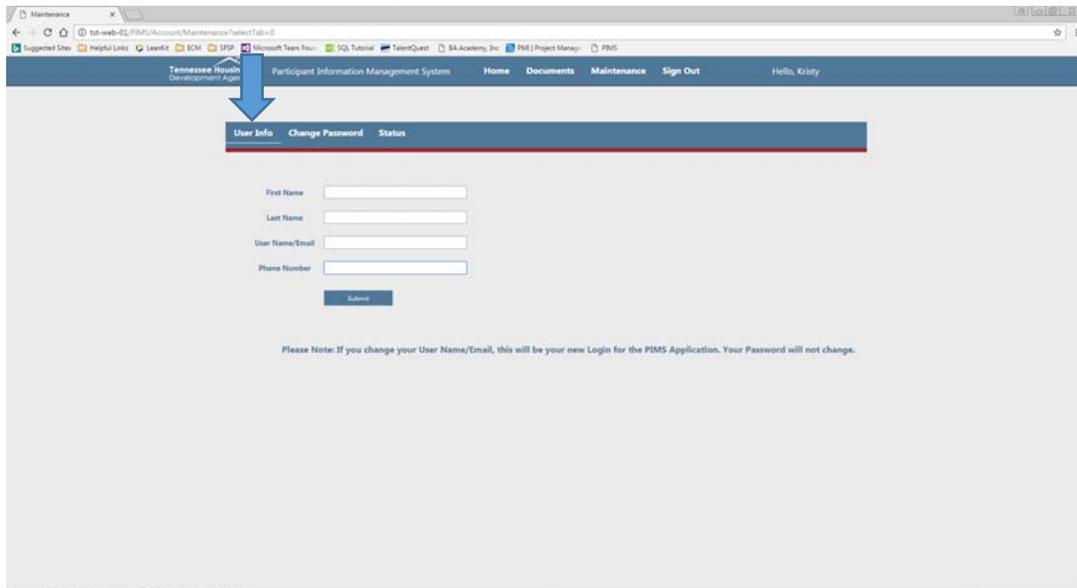
Account Maintenance:

The account maintenance screen allows you to change your name, username/e-mail, phone number, and password.

1. Click on the Maintenance tab at top of the screen.

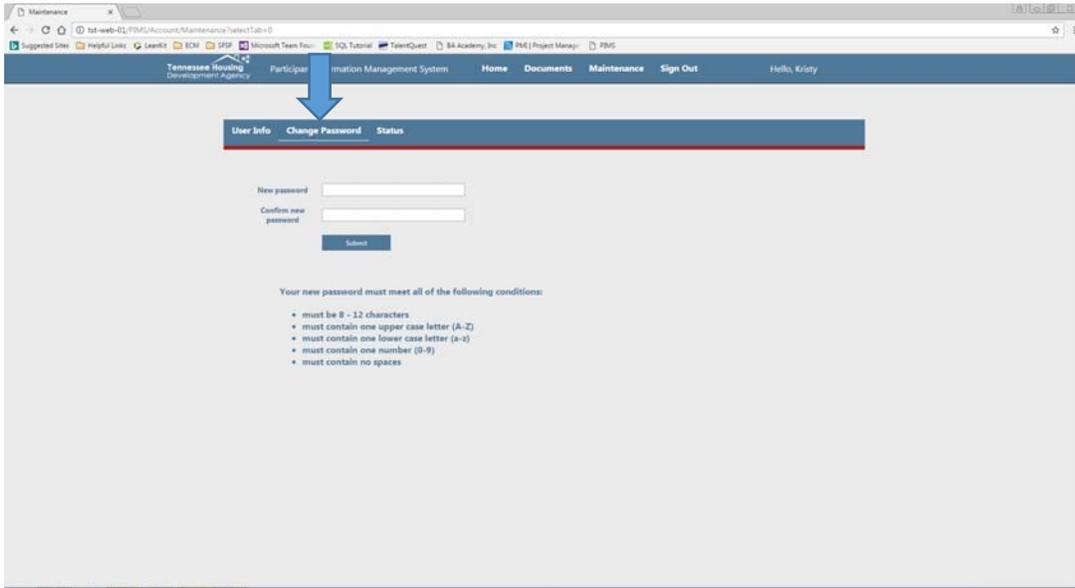


2. Use the User Info tab to change name, username/e-mail, and phone number.



3. Click submit to save all changes.

4. Click Change Password tab to change password.



5. Click submit to save all changes.

Forgot Password:

When logging in you have three attempts to enter the correct password. If the third attempt fails your account will be locked. Use the steps below if you have forgotten your password to avoid having your account locked.

1. Click Forgot Password

The screenshot shows the login page for the Tennessee Housing Development Agency's Participant Information Management System. The page has a blue header with the agency logo and name. Below the header is a login form with two input fields: 'Email/Username' and 'Password', and a 'Login' button. To the right of the form are two links: 'Create Account' and 'Forgot Password'. A blue arrow points to the 'Forgot Password' link. Above the form, a message reads: 'The password you have entered is invalid. If a third attempt fails, your account will be locked. Please consider using the 'Forgot Password' option, which will generate an automatic email to you which will allow you to change your password.' Below the form is a section for 'Minimum Browser Requirements' and contact information for assistance: 'If you need further assistance please contact: E-mail: dcastle@thda.org'. The footer of the page reads 'Tennessee Housing Development Agency'.

2. Enter E-mail (Username)

3. Click Send New Password

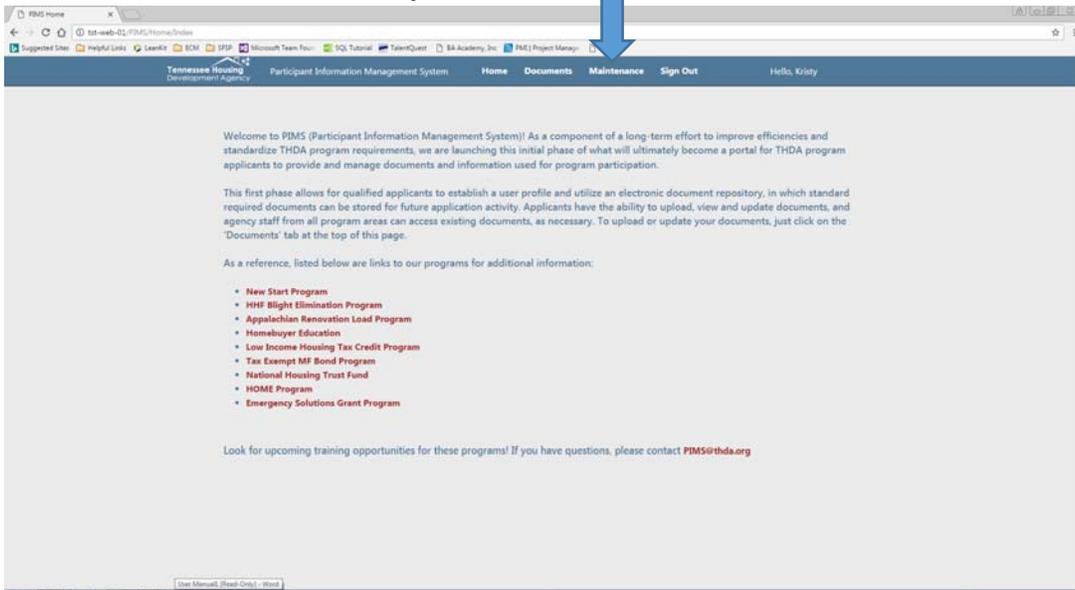
4. You will receive an e-mail with a temporary password and a link to establish your new password.

5. Enter your temporary password, and create your new password, following the required criteria. You will immediately be redirected to the login page, where you can enter the application using your email address (user name) and new password.

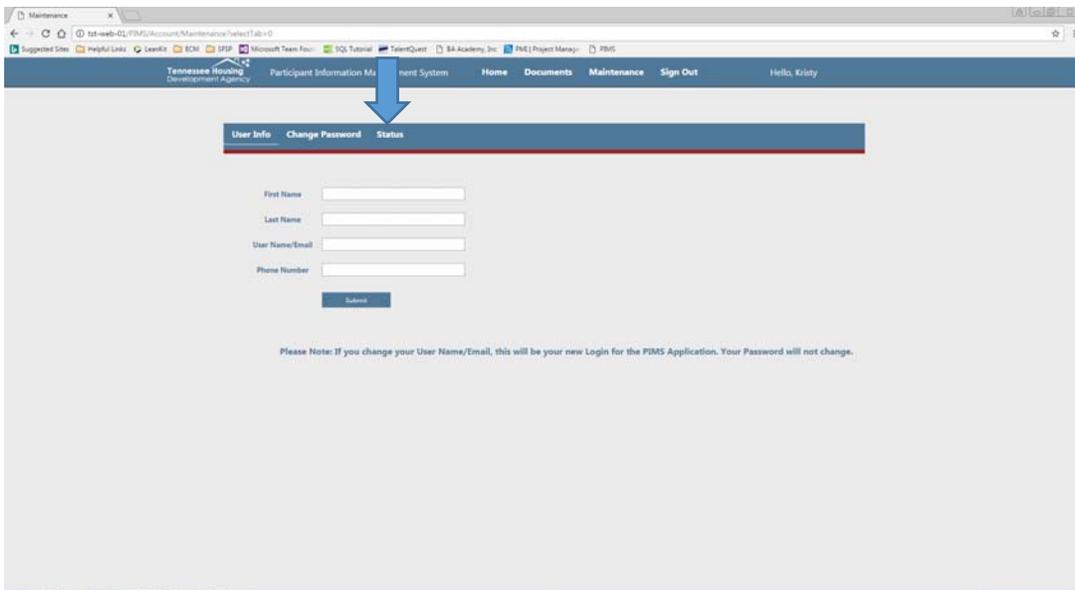
Managers Only:

Managers have the ability to approve, unlock, and deactivate all user accounts for their business.

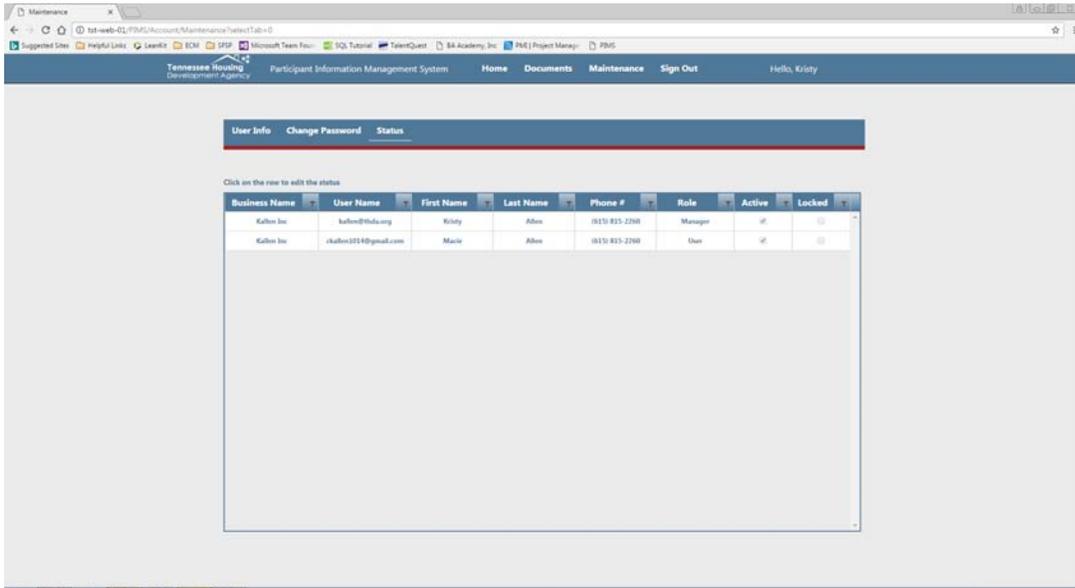
1. User signs up for account under existing business.
2. Receive e-mail stating that someone has requested access to your business account.
3. Login to PIMS
4. Click on Maintenance tab at top of the screen.



5. Click on Status tab

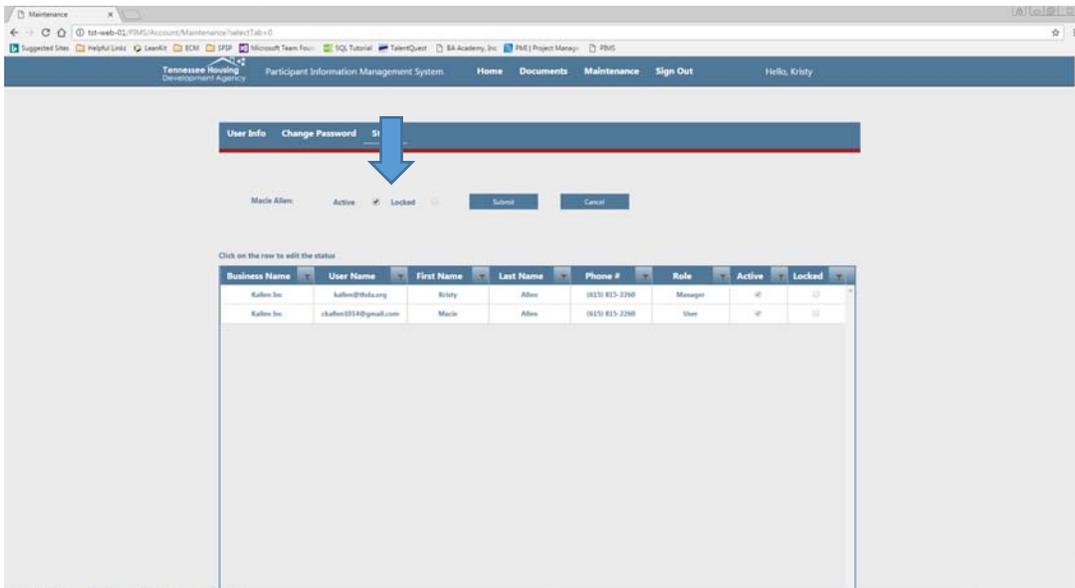


6. You will have a list of all users for your business.



7. Click name of person that you want to make changes to.

**8. To activate account check the active box.
If account is locked, uncheck the locked box.**



9. Click Submit

10. If a person leaves the business their account will need to be deactivated, however; their information will still show in the list. An account is never deleted.

11. To deactivate account: Click on name of person and uncheck the active box.