



CALIFORNIA AFFORDABLE HOUSING MANAGEMENT SYSTEM (CAHMS) USER GUIDE



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Introduction

This user guide offers detailed step-by-step instructions on the following:

1. How to access and register to use the California Affordable Housing Management System (CAHMS) Submission Form.
2. How to upload documents to CAHMS, the centralized document submission platform for the California Department of Housing and Community Development (HCD), California Tax Credit Allocation Committee (CTCAC), and the California Housing Finance Agency (CalHFA).

How to register

Registration Page

You will need to sign up for a free account to access CAHMS, which you can by clicking here: <https://account.box.com/signup/personal?tc=annual>.

Please note this is a **FREE individual account** under the hosting site, box.com.

Sign up process

Here is the step-by-step process on how to complete your registration:

Steps	Examples
3. Complete the registration form by entering the following: • Full Name • Business Email Address • Creating a Password	Your Information Full Name J Doe Business Email Address J.Doe@example.com Password ••••••••••
4. After filling out the form, check the hCaptcha box and click the Get Started button to proceed.	You will receive marketing materials regarding Box products, services, and events. You may unsubscribe at any time. By clicking the "Get Started" button, I agree to Box's Terms of Service and confirm I have read Box's Privacy Policy. ☐ I am human  hCaptcha Privacy - Terms Get Started

5. **Confirm the Email Address:**
Once the registration is complete, a confirmation email will be sent to the provided email address. Clicking the confirmation link will redirect the user to the login page.



Almost there! Please verify your email address

Welcome to Box! Please verify your email to get started.

Verify Email

How to upload documents within CAHMS

Step-by-step instructions on how to upload your documents within the CAHMS Submission Portal.

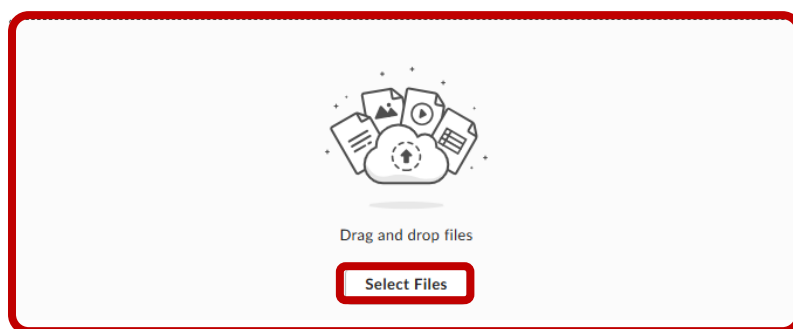
Steps	Examples
6. Once you have created an account, sign in to the CAHMS Document Submission Portal (https://cahms.app.box.com/f/70f16bedc9ed46bda66666b6e1b610ce).	
7. Users will be prompted to choose the submission type from a dropdown menu. • New is for first-time submissions. • Existing is for uploading additional documents to an existing request.	Is this a new request, or an addition to an existing request * New = First time submission for a specific request. Existing = Additional documents for existing submission

8. For uploading documents, the format should be as specified. Format must be Microsoft Word, PDF, and Excel (*.docx, *.pdf, and *.xlsx)

Clicking **Select Files** will allow the user to choose the files for upload.

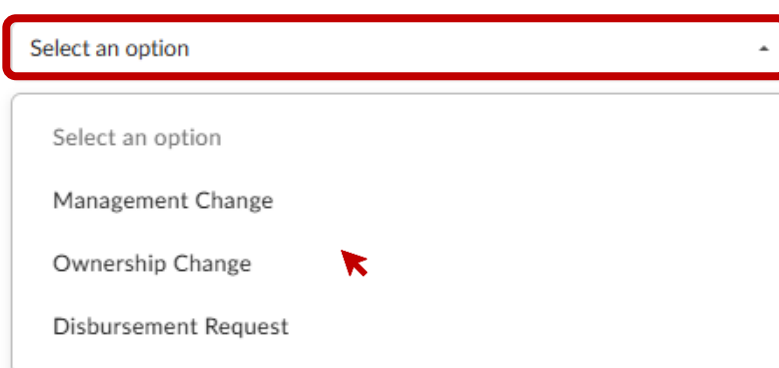
Upload files *

Please use unique file names. Format must be Microsoft Word, PDF, and Excel (*.docx, *.pdf, and *.xlsx)

The image shows a file upload interface. At the top, there is a red-bordered box containing a cloud icon with an upward arrow and several document icons. Below the icon, the text "Drag and drop files" is displayed. At the bottom of the box is a red-bordered button labeled "Select Files".

9. From the dropdown menu under **Action Types**, select the appropriate action corresponding to the submission.

Action Types *

The image shows a dropdown menu for "Action Types". The top bar is red-bordered and contains the text "Select an option" with a small upward arrow on the right. Below this bar is a list of three options: "Management Change", "Ownership Change", and "Disbursement Request". A red mouse cursor is pointing at the "Ownership Change" option.

10. Input project information:

- **Project Name:** enter the full name of the project associated with the document submission.
- **Address (Optional):** Enter the project address if available. This field is optional.

Project Name *

Project Name

Project Name Example

Address (OPTIONAL)

123 Project Street, City, CA 12345

11. Input submitter information:

- **Name of Submitter:** Provide the Name of the Submitter submitting the documents. This field is mandatory.
- **Phone Number of Submitter (Optional):** Enter a contact phone number for the submitter. This field is optional.

Name of Submitter *

J Doe

Phone number of submitter (OPTIONAL)

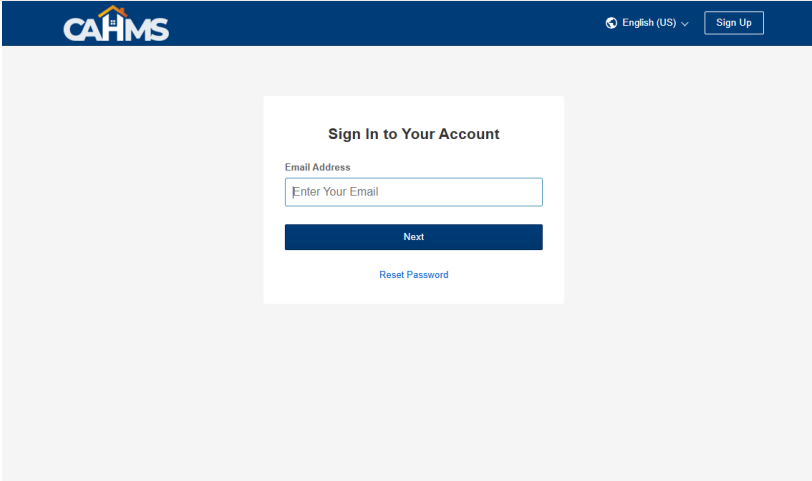
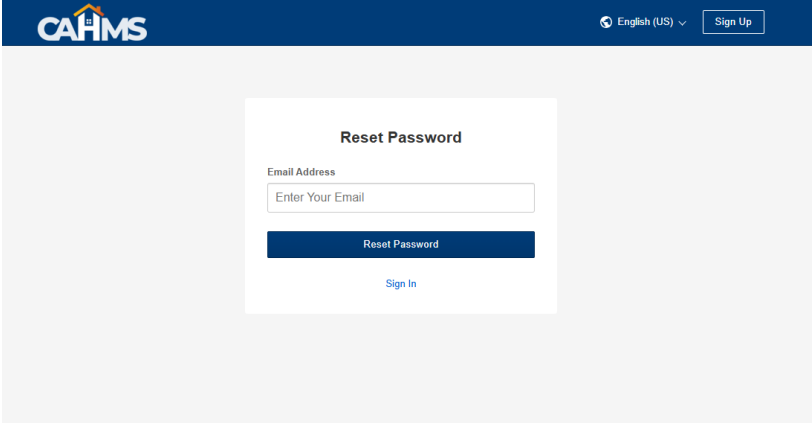
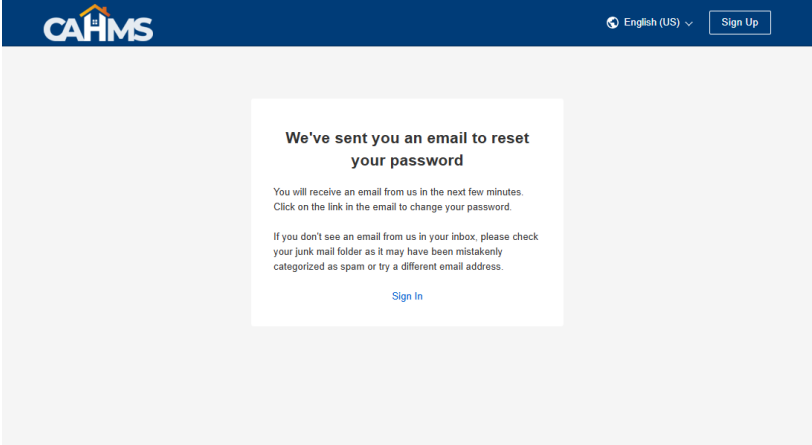
000-000-0000 ext 0000

555-555-5555

• User must provide an email address in the form which will be used as metadata for agencies to contact the Sponsors.	Email address of the submitter * J.Doe@example.com
12. User must provide at least two (2) Project Numbers for each of the fields: • HCD Project Contract # • CalHFA Project Number # • 13. CTCAC Project Number # If any of the Project Numbers do not apply to the submission, the user should enter "0" (without quotes) in the respective field. See example 	HCD Project Contract # * A Project Contract # is required for at least two (2) of the three (3) Agencies. If an agency is not applicable to your submission, please enter the number zero (0) for that agency. 00-ABCD-000 CalHFA Project Number # * A Project Contract # is required for at least two (2) of the three (3) Agencies. If an agency is not applicable to your submission, please enter the number zero (0) for that agency. 01234A TCAC Project Number # * A Project Contract # is required for at least two (2) of the three (3) Agencies. If an agency is not applicable to your submission, please enter the number zero (0) for that agency. 0
14. Clicking the Submit button finalizes the document upload process by the user.	Your email address j.doe@example.com will be recorded when you submit (log out). Submit
15. After successfully submitting the documents through the CAHMS Submission Portal, users will receive a confirmation email indicating that their submission has been received. This email serves as the acknowledgement of the submission.	 [Action Type] documents received. Hello, Your [Action Type] request documents have been received and routed to [relevant departments: HCD, CalHFA, and/or TCAC] for further action. Thank you

Troubleshooting

How to Reset the Password

Steps	Examples
1.Click the Reset Password button on the login page.	
2.Enter your email address in the provided field and click Reset Password again.	
3.Check your email inbox from BOX to create password.	

4. Follow the link in the email to create a new password and regain access to your account.

Your new Box password awaits

You recently requested to reset your password. Please click the button below to start the password reset.

If you did not request a password change, you may ignore this message and your password will remain unchanged.

Create Password

Network Access, Security Policy & File Upload Issues

16. Check with your organization's IT team to confirm that the upload URL is not being blocked by firewall settings or internal security policies. Verify access to the upload link before reaching out to Box Support - this can help expedite the resolution process.

17. If the issue persists, you may need to [submit a request](#) Box Support. You will need to be logged into your free Box account to submit a request.