AHFA DMS To Be Formed Entities

USER GUIDE

***This document will review the process of creating a “To Be Formed” Ownership entity within Authority Online.***

**Step 1: While in an application, to start the process of creating a “To Be Formed” entity on the Owner Information page, in the Ownership Entity Drop Down select “(New Organization)”**



**Step 2: Once you’ve selected “(New Organization)” the appropriate fields will become editable. Provide all applicable information on this page associated with the “To Be Formed” organization entity.**

* At the bottom of the page, a user will have the ability to designate ownership percentages for any Affiliated Organization of their current organization. (**As shown below**).
* Once complete, click **Update**.



**(Step 2 Continued)**

* This user who created the “**To Be Formed**” organization entity as described will now be linked as a user to that “To Be Formed” organization.
* To access this “To Be Formed” organization, a user will need to be in his profile (Click on **My Profile** anywhere within the application). In the profile screen, click on **Change. Organization** located in the Profile section of the left navigation pane (as shown below).



**Step 3: Change Organization**

* Click on the Drop Down menu and select your “**To Be Formed**” organization that you created.
* Click **Set**.



* Notice below that the Current Organization is now set to the “**To Be Formed**” organization entity. From here, the user will now have the ability to update affiliated organizations, partnerships and basic organization information for this To Be Formed organization entity.

