

2025 Annual Bond Report Checklist

Property Name: _____ OID: _____

The following documentation is submitted in support of the annual report **via the electronic portal (submit each item as a separate document)**:

- ☐ *Certificate of Continuing Project Compliance Part A* with Owner's **wet or digital** signature. You can generate this form at: <https://portal.wshfc.org/Forms/AMC-BondPartA>
- ☐ **New this year:** submit Table 1 report in WBARS with the 2025 unit history for the set-aside units. See *WSHFC Annual Bond Compliance Reports Preparation and Submission Instructions* for more information on WBARS.

Note for State Bond properties ONLY (those that say 'Bond - State' in the 'Compliance Type' column on the property list at <https://www.wshfc.org/managers/team.htm>, 'Property Managers/Owners: Find Your Portfolio Analyst Here'). These properties will continue to complete and upload the Part B Excel spreadsheet, not Table 1 in WBARS. The Excel spreadsheet with instructions is provided on our website at <https://www.wshfc.org/managers/forms-bond.htm>

- ☐ *Special-Needs Vacancy Report*, with back-up documentation, if the special-needs Commitments were not met.
- ☐ *Affirmative Marketing Report* (if applicable). To find out if your project is required to complete this report, go to <http://www.wshfc.org/managers/forms-bond.htm>.
- ☐ Section 8 renewal documentation (if applicable)
- ☐ Documentation for all Qualified Residents including new move-ins, those that transferred units, and those required to re-certify annually.
 - Certifications requested are for calendar year 2025.
 - Resident Certifications should be saved and submitted as separate files in the following format: Unit Number, Resident Last Name.
 - Certification forms were changed in 2025 to integrate new HOTMA regulations. When HOTMA was implemented at a property will determine which forms should have been utilized to certify households. Certifications must include, but are not limited to, copies of the following documents, assembled in the following order:
 - ☐ *Household Eligibility Certification* (HEC) or new *Tenant Income Certification* (TIC)
 - ☐ *Rental Eligibility Application* (REA) or new *Household Eligibility Application* (HEA)
 - ☐ *Household Declaration Supplement to REA* (not required with new forms)
 - ☐ *Authorization to Release Confidential Information* (not required with new forms)
 - ☐ Income verification documentation (must comply with the Bond Compliance Manual *Income Section*)
 - ☐ Verification of assets or *Sworn Statement of Net Household Assets* form (not required with new forms)
 - ☐ *Disabled Status Certification* (for projects with a disabled commitment)
 - ☐ *Disability Verification* if applicable
 - ☐ *Student Certification* (for projects using HUD Form 50058 and 50059 with a HUD questionnaire in place of our REA or HEA and households where all members are students)

- ☐ Age verification for elderly-designated projects
- ☐ Bond Lease Rider

➤ Please use this link <https://portal.wshfc.org/Forms/AMC-BondReport> to submit all your annual report documents. Instructions on how to use this system are on our web site at <http://www.wshfc.org/managers/forms-bond.htm>.

Prepared By: _____ Date: _____

Phone Number: _____ Email: _____