

WSHFC Annual Tax Credit Compliance Reports Preparation and Submission Instructions

REPORTS DUE 01/31/2021

PREPARE YOUR MATERIALS FOR SUBMISSION

Forms are located at <http://www.wshfc.org/managers/forms-tc.htm>

1. **Download the applicable report request letter and checklist for your property.**
 - a) Look up your property's report type - Regular, On-Site Year or Post 15/Recert Waiver - on the *Report Types by Property Name* list (either PDF or Excel version).
 - b) Download the request letter (with the *Report Checklist* attached) which corresponds to the type of report required.

2. **Download the Owner's Annual Certification.**
 - a) **Owner's Annual Certification** – Owner must complete all questions on every page and sign the form (electronic signature is acceptable). The form must be submitted as part of the property's annual report package.
 - b) **WBARS Annual Summary Report** – This must be downloaded from WBARS after Table 1 has been submitted to the Funder level. The **Annual Summary Report** is a required attachment to the *Owner's Annual Certification*. *This is not the Table 1 Excel download. It is the Annual Summary Report. Please make sure you submit the correct form.*

3. **Using the Report Checklist for your report type, prepare the other documents listed on the Checklist, as applicable.**
 - We will not mail you a household certification request list. Instead, the instructions for which certifications to submit are on the *Report Checklist* that is attached to the request letter.
 - For properties required to submit a **Regular** report (not an On-Site Year and not a Post-Year 15 Monitoring/Recert Waiver), copies of resident move-in certifications equal to 5% of the total units (or a minimum of 5) must be included with the report submission.
 - Please read the directions on the *Report Checklist* carefully to ensure you submit the correct documents.

If you have questions, please contact the [Portfolio Analyst](#) assigned to your property.

Thank you for your cooperation!

Asset Management & Compliance Division
Washington State Housing Finance Commission
December 2020

SUBMISSION INSTRUCTIONS ON THE FOLLOWING PAGE

SUBMIT YOUR ANNUAL REPORT MATERIALS

Submit materials electronically using our online portal:

<https://portal.wshfc.org/Forms/AMC-Report>

General Information:

- Have all your report forms and resident packages ready to go. Do not start filling in the submission form until you have everything you need. If you start the form and leave it inactive for too long, it will time out and you will have to start your submission all over again.
- All field names followed by a red asterisk are required. You won't be able to successfully submit your form if you skip any required fields or upload sections.
- Note that every Upload section will display what file types are acceptable to attach. If you try attaching a file type that is not listed in the form, your report submission will fail. Example: The Extended Vacancies/Non Rent-Ready Units section only allows PDF and Excel file types. If you try to attach a Word file, the form will reject your file.
- Re-click the portal link to fill in a fresh form for every property you are submitting. If you are using Google Chrome, you can just click the Refresh icon to the left of the URL to open a new, blank form.
- Once you've submitted a form, you can't redo the submission. Contact your Portfolio Analyst for guidance if you submitted any information by mistake or forgot any required forms.

Click on the AMC Report link above; a form will open in your browser (we recommend you use Google Chrome or Microsoft Edge as your internet browser):

The screenshot shows a web browser window displaying the '2020 TAX CREDIT ANNUAL REPORT SUBMISSION' form. The form is titled '2020 TAX CREDIT ANNUAL REPORT SUBMISSION' and is from the 'WASHINGTON STATE HOUSING FINANCE COMMISSION'. It is for the 'WSHFC ASSET MANAGEMENT & COMPLIANCE DIVISION' and is a 'TAX CREDIT ANNUAL REPORT SUBMISSION FORM FOR REPORTING YEAR 2020'. The forms are due on January 31, 2021. The form includes instructions: 'Submit all Annual Report materials for your property using this form. DO NOT START FILLING IN THIS FORM until you have all the documentation assembled to complete the submission. If you do not finish the submission process in one sitting, you will lose all your work and must fill in a new form from scratch. You must complete one form per property. ONCE SUBMITTED YOU CANNOT REDO SUBMISSION.' It also states: 'All "Upload" sections below allow you to upload more than one file at a time. You can drag and drop multiple files into any "Upload" section. Please make note of the file extensions allowed for each "Upload" section. If you try uploading a file type we don't allow, your files will not upload.' The form has a section for 'Property Information' with the following fields: 'Your First Name *', 'Your Last Name *', 'Your Title *', 'Email Address *', 'Property Name, City, OID# *' (with a dropdown arrow), and 'WSHFC Portfolio Analyst' (with a dropdown arrow). The browser's address bar shows 'portal.wshfc.org/Forms/AMC-Report'. The Windows taskbar at the bottom shows the time as 4:01 PM on 12/18/2020.

Type in your information in the first four fields. All information is required:

sitting, you will lose all your work and must fill in a new form from scratch.

You must complete one form per property. **ONCE SUBMITTED YOU CANNOT REDO SUBMISSION.**

All "Upload" sections below allow you to upload more than one file at a time. You can drag and drop multiple files into any "Upload" section. Please make note of the file extensions allowed for each "Upload" section. If you try uploading a file type we don't allow, your files will not upload.

Property Information

Your First Name *	Meissa
Your Last Name *	Example
Your Title *	Property Manager
Email Address *	meissa.donahue@wshfc.org

Click in the fifth field to open a drop-down list of all WSHFC Tax Credit properties. The property list is in alphabetical order. Find your property name and click on it:

Your Last Name *	Example
Your Title *	Property Manager
Email Address *	meissa.donahue@wshfc.org
Property Name, City, OID# *	Brandenwood Apartments, Bellevue, 90-18U
WSHFC Portfolio Analyst	Michael Soper
Report Type	On-Site Post 15 Inspection
Report Cover Letter	
Owner's Annual Certification	

When you've chosen your property, the form will pause for several seconds and then auto-populate the next two fields to display the property's monitoring Portfolio Analyst and your property's 2020 annual report type:

Property Name, City, OID# *	Brandenwood Apartments, Bellevue, 90-18U
WSHFC Portfolio Analyst	Michael Soper
Report Type	On-Site Post 15 Inspection
Report Cover Letter	

The following several sections can be displayed by clicking on the down arrow to the far right of each section name:

Report Type	On-Site Post 15 Inspection
Report Cover Letter	
Report Cover Letter (optional)	<small>If you wish to send us an explanation or additional information regarding your submission.</small> <input type="button" value="Upload"/> <small>Upload only pdf, doc, docx</small>
Owner's Annual Certification	
Utility Allowance Schedules	
Extended Vacancies or Non Rent-Ready Units	
Special Needs Commitments	
Affirmative Marketing Report	
Income Averaging Test - Worksheet	
Resident Packages	

In each section, upload the required files. Some sections will require you to answer a question before determining whether or not you need to submit certain forms. An example of this is the Utility Allowance Schedules section:

OAC Upload* Complete the OAC and have it signed by the property's Authorized Signer. Then scan the form and upload it here:
Upload
Upload only pdf, doc, docx

Utility Allowance Schedules

Assemble all utility allowance schedule(s) used to determine actual rent payments for the entire 2020 reporting period. On the schedule(s), circle the applicable amounts used for all unit sizes and provide total.
Note: The totals displayed on your schedules must match what you entered in WBARS.

Does the Owner pay all utilities for the entire project? * Yes No

Extended Vacancies or Non Rent-Ready Units

Special Needs Commitments

Affirmative Marketing Report

Income Averaging Test - Worksheet

Resident Packages

If you answer “Yes”, then the form will not require you to upload any utility allowance schedule files. If you answer “No”, then the form will provide an Upload button so you can submit the required files:

Does the Owner pay all utilities for the entire project? * Yes No

Utility Allowance Schedules* Upload your utility allowance schedule(s) here:
Upload
Upload only pdf, doc, docx

Extended Vacancies or Non Rent-Ready Units

Special Needs Commitments

Affirmative Marketing Report

The last upload section is for resident packages. Depending on your property’s annual report type, you may not be required to submit resident packages with your other report materials. After opening the Resident Packages section, choose your property’s report type from the “Select your report type” drop down list:

Resident Packages

Please upload **one black and white PDF file per resident package** saved as unit number and then resident last name (i.e. A105 Doe) into the box below, based on the report type that is noted at the top of this page (Annual Tax Credit Review, Post 15 Annual Review, or On-site Tax Credit Inspection).

Select your report type * Annual Tax Credit Review

Annual Tax Credit Review

- Submit move-in certifications for 5% of total property units (minimum 5 units). If fewer than 5% of your units turned over in 2020, then submit all move-in certifications plus recertifications until you reach 5% or a minimum of 5 certifications.
- Submit move-in and current certifications for households whose income exceeded 140% of their income limit at their first-year recertification

Resident Packages* You can drag and drop multiple PDF files (one resident package per file) into this section or all resident packages can be uploaded in a single zip folder.
Upload
Upload only pdf, zip

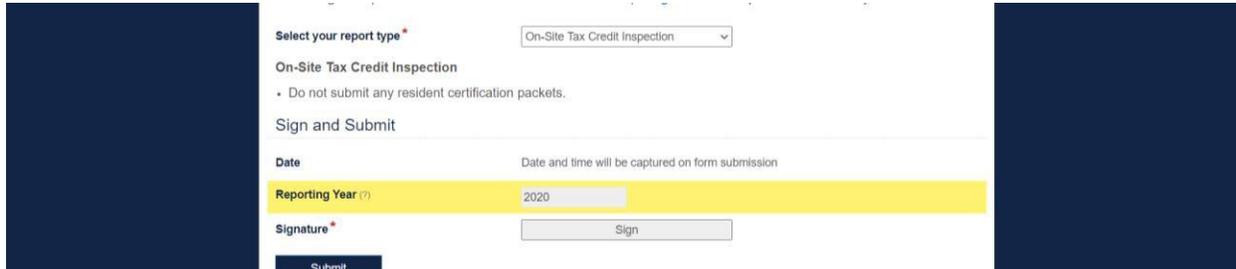
Sign and Submit

If you forgot what report type applies to your property, scroll back up the form to review the Report Type field under the property name. When you select your property’s report type, instructions will appear telling you what type and how many files you must attach in the Upload section.

Before attaching your resident files , make sure you have done the following:

- You have prepared each resident certification as a black and white PDF file.
- Each file should only contain the certification for one household. Do not combine multiple households into a single PDF file.
- You have named each certification file with the unit number and the resident’s last name. Examples: A105 Smith, 10 Jones, HB-4567 Green.
- To upload multiple files, re-click the Upload button to attach each subsequent file.

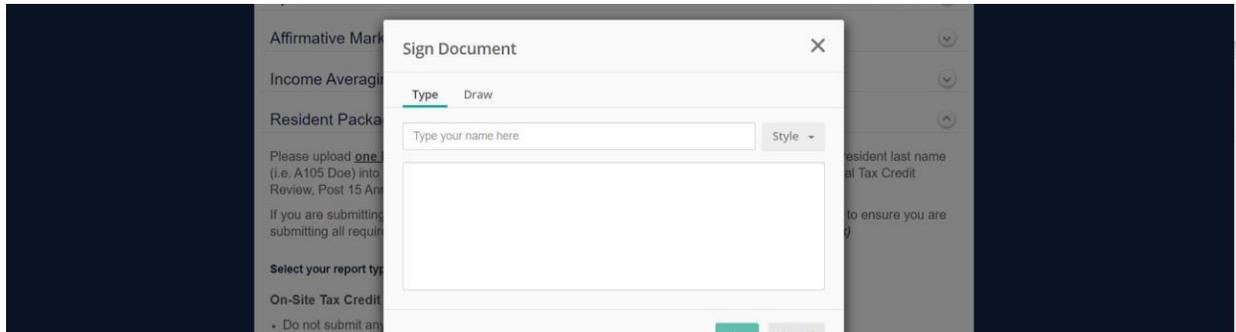
Once you have attached all your resident packages (or skipped this section, depending on your property’s report type), you can sign and submit the form to the Commission. The default reporting year for this form is for 2020:



The screenshot shows a web form titled "Sign and Submit". At the top, there is a dropdown menu for "Select your report type" with "On-Site Tax Credit Inspection" selected. Below this is a section for "On-Site Tax Credit Inspection" with a note: "Do not submit any resident certification packets." The "Date" field is labeled "Date and time will be captured on form submission". The "Reporting Year" field is highlighted in yellow and contains the value "2020". Below the "Reporting Year" field is a "Signature" field with a "Sign" button. At the bottom left, there is a "Submit" button.

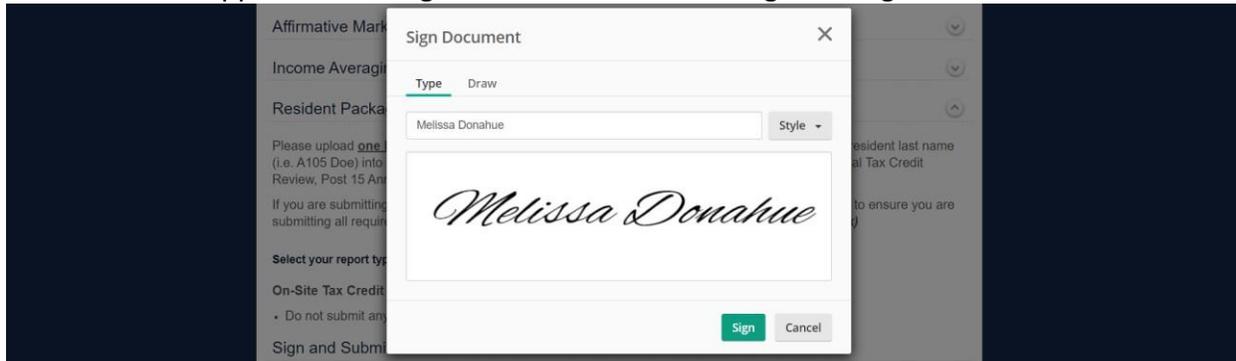
If you need to submit annual report materials for another year, please contact your Portfolio Analyst for further instructions.

Click the “Sign” button (see “Signature” field above) and type your name in the “Type your name here” field:



The screenshot shows a "Sign Document" dialog box. It has two tabs: "Type" (active) and "Draw". In the "Type" tab, there is a text input field labeled "Type your name here" which is currently empty. To the right of the input field is a "Style" dropdown menu. Below the input field is a large, empty text box for the signature. At the bottom right of the dialog box, there are "Sign" and "Cancel" buttons.

Your name will appear in the large text box. Then click the green “Sign” button:



The screenshot shows the "Sign Document" dialog box with the "Type" tab active. The "Type your name here" field now contains the name "Melissa Donahue". Below the input field, the large text box now displays a cursive signature of "Melissa Donahue". The "Sign" button is highlighted in green, indicating it is the next step.

Your signature will appear in the “Signature” field on screen. Once that happens, you can click the blue “Submit” button:



Sign and Submit

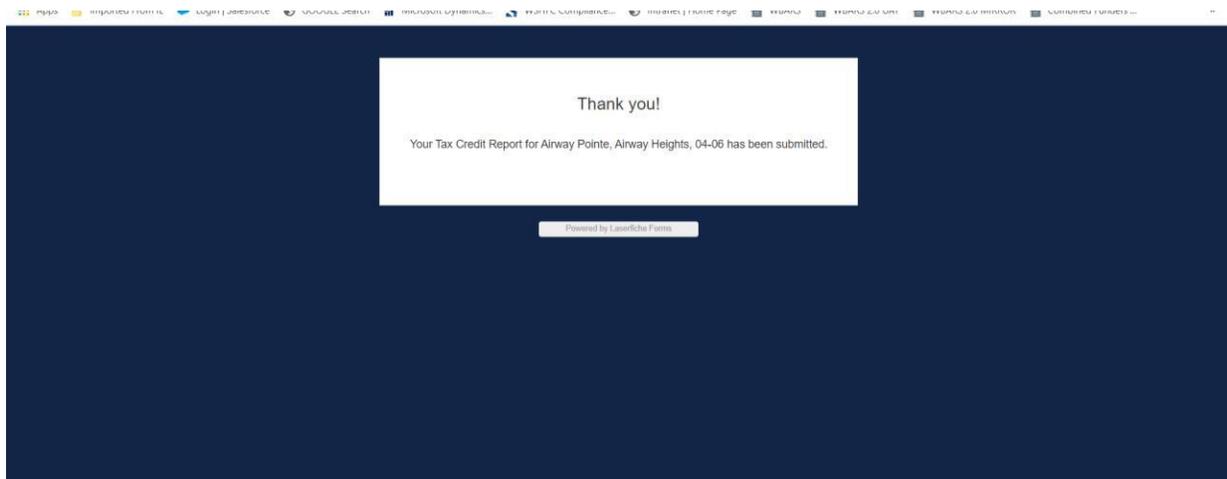
Date Date and time will be captured on form submission

Reporting Year (?) 2020

Signature* *Melissa Donahue*

Submit

When you click “Submit” – if you do not have any errors preventing the submission – you will see a “Thank You” screen:



This is your confirmation that your materials have been successfully submitted to the Commission. You do not need to do anything else. Commission staff will review your submission and follow up with you if they need corrections or additional documentation.