

WSHFC Annual Bond Compliance Reports Preparation and Submission Instructions

REPORTS DUE 01/7/2022

PREPARE YOUR MATERIALS FOR SUBMISSION

- Utilize the *Certificate of Continuing Project Compliance (CCPC - Part A)* emailed with the annual report request letter.

Prepare your resident certifications:

- Format 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.
- Name each certification file with the unit number and the resident's last name.
Examples: A105 Smith, 10 Jones, HB-4567 Green.
- **Additional reporting forms are located at <http://www.wshfc.org/managers/forms-bond.htm>**

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 2021

SUBMISSION INSTRUCTIONS ON THE FOLLOWING PAGE

SUBMIT YOUR ANNUAL REPORT MATERIALS

Submit materials electronically using our online portal:

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

General Information:

- Have all your report forms and resident certifications 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.
- 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.
- 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.

Step-by-step Instructions:

Click on the **AMC-BondReport** link above; the submission form will open in your browser (it may take a moment to generate, we recommend using Google Chrome or Microsoft Edge as your internet browser):

The screenshot shows the 'Bond Annual Report Submission' form. At the top left is the Washington State Housing Finance Commission logo with the tagline 'Opening doors to a better life'. The title 'Bond Annual Report Submission' is centered, with 'Asset Management & Compliance Division' below it. The main text instructs users to submit all annual report materials and warns not to start filling in the form until all documentation is ready. It also states that once submitted, the submission cannot be redone. Instructions for file naming and required documents (HEC, REA, release forms, etc.) are provided. The 'Property Information' section contains four required fields: First Name, Last Name, Title, and Email Address, each with a text input box. A note below the email field says 'Enter the Email address for the person to contact if we have questions with the submission.'

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

example: [B100-Simkin.pdf](#)

The resident package should include the *HEC, REA, any release forms, third party income and asset documents, Special Needs, Student or Miscellaneous forms as needed, -or- Self Certification.*

Property Information

First Name *	Mary
Last Name *	Example
Title *	Property Manager
Email Address *	Enter the Email address for the person to contact if we have questions with the submission. mary.example@aol.com
Property Name, City, OID# *	

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

Title *	Property Manager
Email Address *	Enter the Email address for the person to contact if we have questions with the submission. mary.example@aol.com
Property Name, City, OID# *	Sunrise Court, Aberdeen, 90-05B
OID Number	90-05B
WSHFC Portfolio Analyst	Michael Soper
Reporting Year *	

When you've chosen your property, the form will pause for a few seconds and then auto-populate the next two fields to display the property's unique ID and the monitoring Portfolio Analyst:

Property Name, City, OID# *	Sunrise Court, Aberdeen, 90-05B
OID Number	90-05B
WSHFC Portfolio Analyst	Michael Soper
Reporting Year *	

In the next field, choose the reporting year, **2021**. If you need to submit materials for a different reporting year, please contact your property's Portfolio Analyst for more guidance.

OID Number	90-05B
WSHFC Portfolio Analyst	Michael Soper
Reporting Year *	2021

Owner's Annual Reports

In each section below, click the **Upload** button to upload the required documents. Note that each section lists the file types that are acceptable to attach. If you try attaching a file type that is not listed in the form, the upload will not be successful.

Per the instructions, do not consolidate your files using Adobe Acrobat's "PDF Portfolio" feature, since each document imported has to be its own individual file.

To upload multiple files in any section, re-click the Upload button to attach each subsequent file.

WSHFC Portfolio Analyst Michael Soper

Reporting Year* 2021

Owner's Annual Reports

Multiple files can be uploaded into each upload box (One report per file). **PDF Portfolios are not an acceptable way to submit multiple files and will require a resubmission.**

Resident Packages Include unit number and household name. Example: B108-Smith.pdf

Upload

Upload only pdf. One resident package per file. PDF Portfolios are not an acceptable way to submit multiple files and will require a resubmission.

Affirmative Marketing Report Upload

Upload only pdf. PDF Portfolios not acceptable.

Bond Part A/CCPC Upload

Upload only pdf, doc, docx. PDF Portfolios not acceptable.

Bond Part B Upload

Once you have attached all your compliance documents, you can sign and submit the form to the Commission:

Multiple files can be uploaded into each upload box (One report per file). **PDF Portfolios are not an acceptable way to submit multiple files and will require a resubmission.**

Resident Packages Include unit number and household name. Example: B108-Smith.pdf

Upload

A105 Green.pdf	33.82KB	X
A106 Jones.pdf	33.82KB	X

Upload only pdf. One resident package per file. PDF Portfolios are not an acceptable way to submit multiple files and will require a resubmission.

Affirmative Marketing Report Upload

Bond compliance document-test.pdf	34.06KB	X
-----------------------------------	---------	---

Upload only pdf. PDF Portfolios not acceptable.

Bond Part A/CCPC Upload

Bond compliance document-test.pdf	34.06KB	X
-----------------------------------	---------	---

Upload only pdf, doc, docx. PDF Portfolios not acceptable.

Bond Part B Upload

Bond compliance document-test.pdf	34.06KB	X
-----------------------------------	---------	---

Upload only pdf, xls, xlsx. PDF Portfolios not acceptable.

Other Upload

Bond compliance document-test.pdf	34.06KB	X
-----------------------------------	---------	---

Upload only pdf, doc, docx

Corrections - per PA instruction Contact the property's WSHFC Portfolio Analyst before submitting corrections.

Upload

Upload only pdf

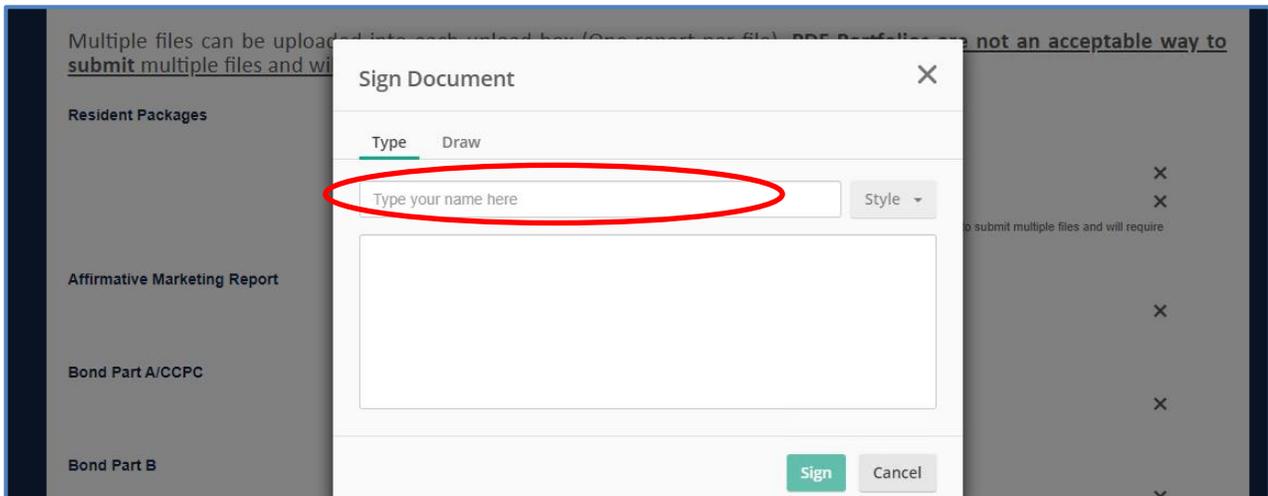
Sign and Submit

Date Date will be captured on form submission

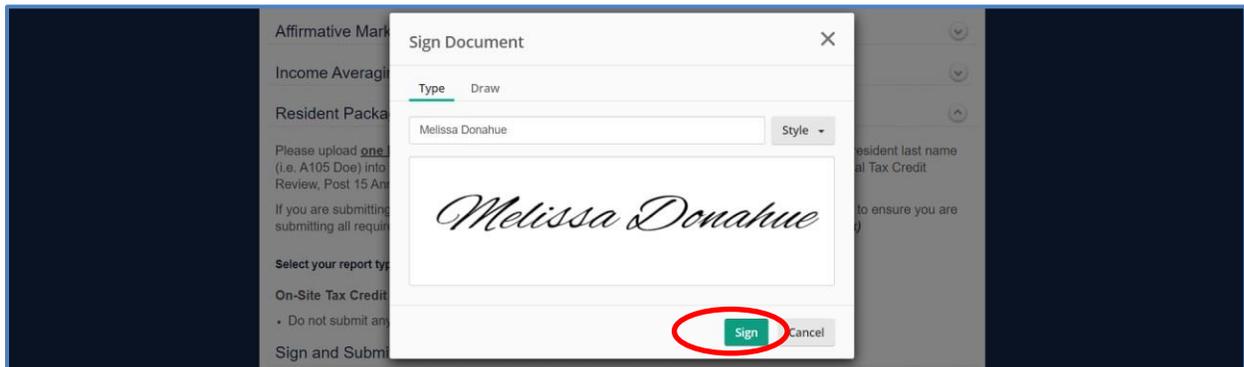
Signature* Sign

Submit

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



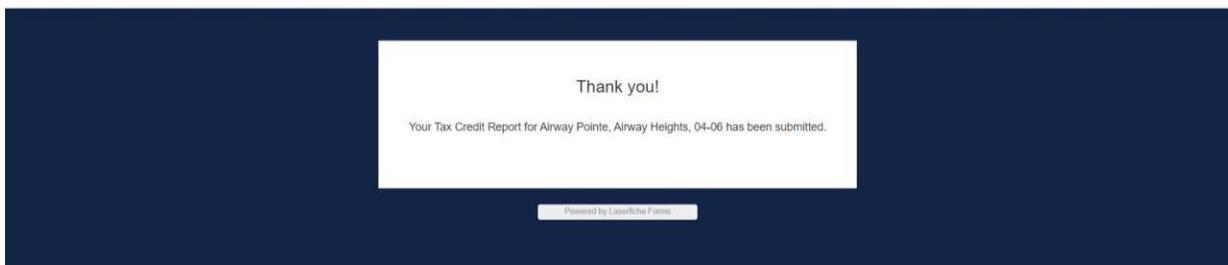
Your name will appear in the large text box. Then click the green “Sign” button:



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



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.