

WSHFC Annual Tax Credit Compliance Reports Preparation and Submission Instructions

REPORTS DUE 01/31/2024

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 (form revised for 2023)*.**
 - 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 Project Summary Report** – This must be downloaded from WBARS after Table 1 has been submitted to the Funder level. The **Project Summary Report** is a required attachment to the *Owner's Annual Certification*. *This is not the Table 1 Excel download. It is the Project 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 5 resident certification packets must be included with the report submission. See *Report Checklist* for selection criteria.
 - 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 2023

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):

WASHINGTON STATE HOUSING FINANCE COMMISSION
Opening doors to a better life

TAX CREDIT ANNUAL REPORT SUBMISSION
WSHFC ASSET MANAGEMENT & COMPLIANCE DIVISION
TAX CREDIT ANNUAL REPORT SUBMISSION FORM
ALL FORMS DUE JANUARY 31st

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.** Contact your WSHFC Portfolio Analyst if you need to make corrections.

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. PDF Portfolios are not an acceptable way to submit multiple files and will require a resubmission.

Your First Name*

Last Name*

Email Address*

Your Title*

Property Information

Property Name, City, OID#*

WSHFC Portfolio Analyst

Report Type

Reporting Year

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

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

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:

Property Information

Property Name, City, OID#*
Brandenwood Apartments, Bellevue, 90-18U

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 2023 annual report type:

Property Information

Property Name, City, OID#*
Brandenwood Apartments, Bellevue, 90-18U

WSHFC Portfolio Analyst
Michael Soper

Report Type
Post 15 Annual Review

Reporting Year
2023

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

Report Cover Letter	▲
Report Cover Letter (optional) If you wish to send us an explanation or additional information regarding your submission. <input type="button" value="Upload"/> <small>Upload only pdf, doc, docx. PDF Portfolios are not an acceptable way to submit multiple files and will require a resubmission.</small>	
Owner's Annual Certification	▼
Utility Allowance Schedules	▼
Extended Vacancies or Non Rent-Ready Units	▼
Special Needs Commitments	▼
Affirmative Marketing Report	▼
Average Income 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 CAC 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

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 certifications. Follow the instructions noted after you open this section:

Resident Packages

IMPORTANT INSTRUCTIONS:
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 "Upload" box below.

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 the reporting year, 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 Certifications* You can drag and drop multiple PDF files (one resident package per file) into this box.
Upload
Upload only pdf, PDF Portfolios are not an acceptable way to submit multiple files and will require a resubmission.

Sign and Submit

If your property shows an Inspection Report Type, DO NOT attach resident certifications to this form:

The screenshot shows a web form with the following fields and options:

- Property Name, City, OID#*: LARC @ Kent, Kent, 15-143A
- WSHFC Portfolio Analyst: strawna.higgins
- Report Type: On-Site Tax Credit Inspection (highlighted in yellow and circled in red)
- On-Site Tax Credit Inspection
 - Do not submit any resident certification packets.
- Reporting Year (?): 2021
- Report Cover Letter
- Owner's Annual Certification
- Utility Allowance Schedules
- Extended Vacancies or Non Rent-Ready Units
- Special Needs Commitments
- Affirmative Marketing Report
- Income Averaging Test - Worksheet
- Sign and Submit
- Date: Date and time will be captured on form submission

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.
- If you want to put all your PDF files into a zip folder and attach just the zip folder (rather than attaching every PDF file individually), you can do that as well.
- 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 screenshot shows the 'Sign and Submit' section of the form with the following fields:

- Date: Date and time will be captured on form submission
- Signature*: [Text input field]
- Sign: [Sign button]

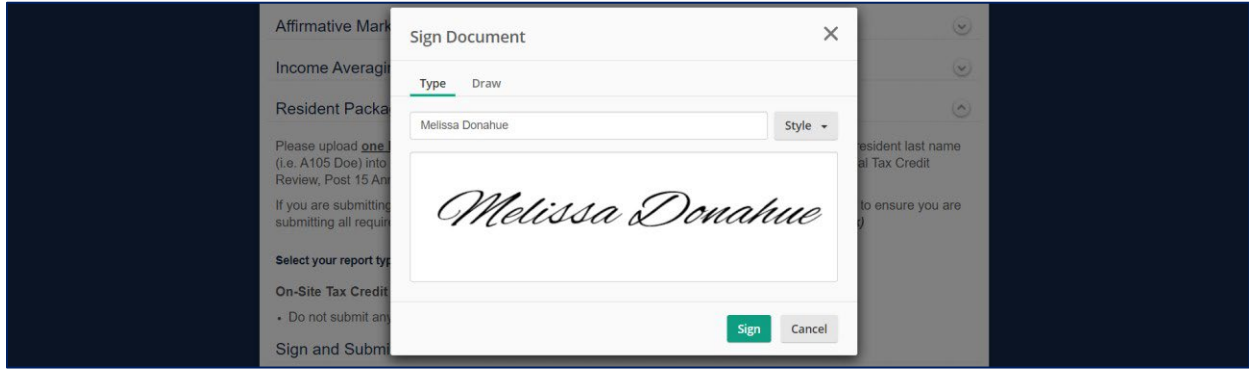
The default reporting year for this form is for 2023. If you need to submit annual report materials for another year, please contact your Portfolio Analyst for further instructions.

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 with the following fields:

- Type: [Selected]
- Draw: [Unselected]
- Type your name here: [Text input field]
- Style: [Dropdown menu]

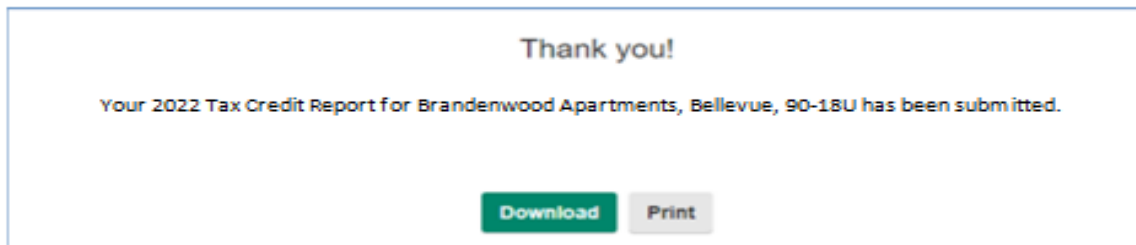
Your name will appear in the large text box. Then click the green “Sign” button:



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 (with 2023 in the message):



This is your confirmation that your materials have been successfully submitted to the Commission. You can Download or Print this message if you want. 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.