

WSHFC Annual Bond Compliance Reports Preparation and Submission Instructions

REPORTS DUE 01/7/2025

REPORTING REQUIREMENTS

In accordance with the terms of the Regulatory Agreement, the annual compliance report for the period January 1, 2024, through December 31, 2024, is due on or before January 7, 2025 for all Bond properties. The Bond Annual Report Checklist located at <https://www.wshfc.org/managers/forms-bond.htm> outlines the documentation required to satisfy the annual reporting requirements. Please include this checklist with your report submission.

All report documents and resident certifications must be submitted electronically. Please do not send any annual report materials (especially resident packages containing personally identifiable information) to the Commission by mail or email.

If you have made any changes to staff, please submit a completed Change of Property Contact Information Form, found at <http://www.wshfc.org/managers/formsindex.htm>. This form should be submitted under the 'Other documentation' section on the Bond Annual Report Submission form in our reporting portal (see link on next page).

If you require further assistance, contact your Portfolio Analyst. Please see 'Find Your Portfolio Analyst by Property Name' at <https://www.wshfc.org/managers/team.htm> for their name and contact information. *Note: We have made several changes to Portfolio Analyst assignments.*

PREPARE YOUR MATERIALS FOR SUBMISSION

Generate a *Certificate of Continuing Project Compliance (CCPC - Part A)* specific to each property at <https://portal.wshfc.org/Forms/AMC-BondPartA>.

- Select the Project Name from the dropdown menu, answer all questions, and add explanations where required.
- Then Download the form and either print and send it to the Authorized Signer for signature or email it to them directly from the form.
- Have Authorized Signer sign the form (wet signature or electronic signature is acceptable) and return it to you to upload with the annual report.

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>**

Thank you for your cooperation!

Asset Management & Compliance Division

Washington State Housing Finance Commission

December 2024

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):



WASHINGTON STATE
HOUSING FINANCE
COMMISSION

Opening doors to a better life

Bond Annual Report Submission

Asset Management & Compliance Division

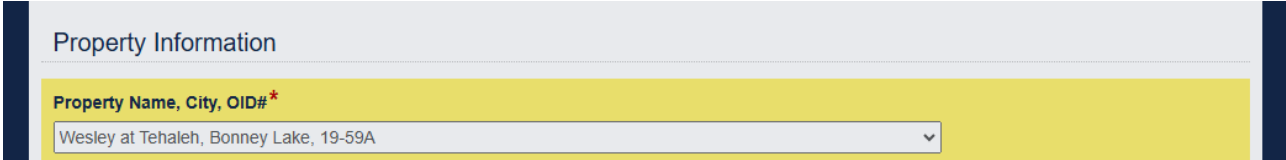
Submit all annual report materials for your property using this form. **DO NOT START FILLING IN THIS FORM** until you have all the documentation assembled to complete the submission. If you do not finish the submission process in one sitting, you will lose all your work and must fill in a new form from 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.

For each property, scan each item for your annual report separately. For each Initial or recertification package, scan all the documents relating to that household into a single file, and include the unit number and household name in the file name. For example: ***B108-Smith.pdf*** (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.)

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.***

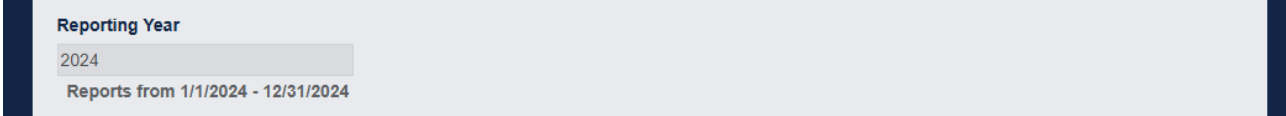
Click in the first field to open a drop-down list of all WSHFC properties. The property list is in alphabetical order (properties under the Washington Works program have a 'WW-' in front of the name). Find your property name and click on it:



When you've chosen your property, the form will pause for a few seconds and then auto-populate the next five fields to display the city the property is in, the property's unique ID and the monitoring Portfolio Analyst. Please verify that this information is correct before proceeding as we have several properties with the same or similar names.



In the next field, 2024 will be listed as the reporting year. If you need to submit materials for a different reporting year, please contact your property's Portfolio Analyst for more guidance.



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.

New this year: The Bond Part A specific for each property must be generated at <https://portal.wshfc.org/Forms/AMC-BondPartA>. See instructions under Prepare Your Materials for Submission on page 1 of this document.

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 Certifications

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

Upload only pdf. One resident package per file. However, multiple files can be attached into each upload section. PDF Portfolios are not an acceptable way to submit multiple files and will require a resubmission.

Affirmative Marketing Report

Upload only pdf. PDF Portfolios not acceptable.

Bond Part A/CCPC. Include any additional required documents related to Bond Part A.

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

To obtain the Bond Part A form, go to <https://portal.wshfc.org/Forms/AMC-BondPartA> to complete. Then download the completed online form to be signed by the Owner. Once signed, upload Bond Part A here.

Once you have attached all your compliance documents, enter your information on the bottom of the form. Then Click the "Submit" button.

Your Information

Your First Name *

Last Name *

Your Title *

Email Address *

Date

Date will be captured on form submission

When you click "Submit" – if you do not have any errors preventing the submission – you will see a "Thank You" screen with the name and OID of the property submitted:

Thank you!

Your 2024 Bond Report for Z-Happy Valley Apts, test, 00-00 has been submitted.

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.