WSHFC Annual Tax Credit Compliance Reports Preparation and Submission Instructions

REPORTS DUE 01/31/2026

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 December 2025).
 - a) **Owner's Annual Certification (OAC)** 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) **NEW THIS YEAR: WBARS Project Summary Report** Owner must acknowledge on the OAC that they reviewed the data submitted in WBARS for the property and certify that it is correct. This includes Table 1, Table 5 and the **Project Summary Report**. It is important that this report, which summarizes the entries on Table 1, reflects the property in compliance. If it doesn't, corrections may need to be made on Table 1 and a new Project Summary Report generated and checked prior to submitting Table 1. A copy of the **Project Summary Report** does not need to be submitted with the annual report package.
 - c) NEW THIS YEAR: All attachments to the OAC should be uploaded in the 'OAC Attachments' area on the Tax Credit Annual Report Submission form in our online reporting portal, not with the OAC form or as a separate OAC upload.
- 3. Using the *Report Checklist* for your report type, prepare the other documents listed on the *Checklist*, as applicable.
 - No resident certification files are required to be submitted with Annual Report materials. Files will be requested by Portfolio Analysts as they prepare to review your property's Annual Report.
 - Please read the directions on the *Report Checklist* carefully to ensure you submit the correct documents.

If you have questions, please contact the monitoring Portfolio Analyst assigned to your property.

Thank you for your cooperation!
Asset Management & Compliance Division
Washington State Housing Finance Commission
December 2025
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 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.
- 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.
- SUBMIT ONLY ONE FORM PER PROPERTY. Once you've submitted a form for a property, don't redo or submit another one. 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 Report link above; a form will open in your browser (we recommend you use Google Chrome or Microsoft Edge as your internet browser):

TAX CREDIT ANNUAL REPORT SUBMISSION



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

Opening doors to a better life

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.

SUBMIT ONLY ONE FORM PER PROPERTY. Once you've submitted a form for a property, don't redo or submit another one. Contact your Portfolio Analyst for guidance if you submitted any information by mistake or forgot any required forms.

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.

Click in the first box under Property Information to open a drop-down list of all WSHFC Tax Credit properties. The property list is in alphabetical order with the city and OID noted. Find your property and click on it:

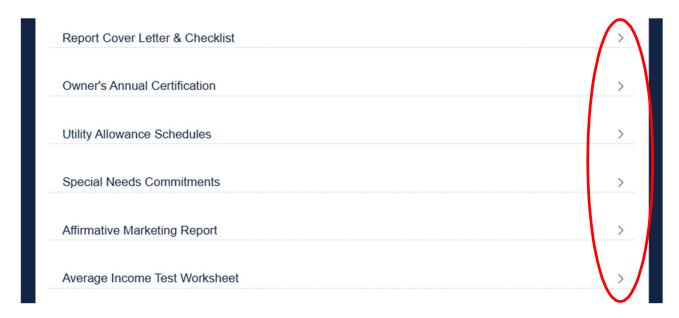


When you've chosen your property, the form will pause for several seconds and then auto-populate the next five fields to display the Property Name, city the property is in, the property's unique ID Number, the monitoring Portfolio Analyst, and your property's 2025 annual report type. Please verify that this information is correct before proceeding as we have several properties with the same or similar names.



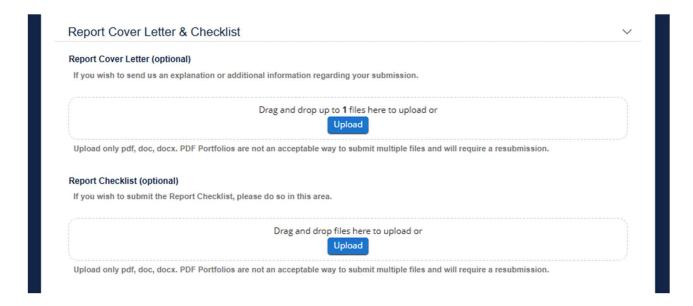
Note: 2025 will be listed as the reporting year. If you need to submit materials for a different reporting year, please contact your property's Portfolio Analyst for more guidance.

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

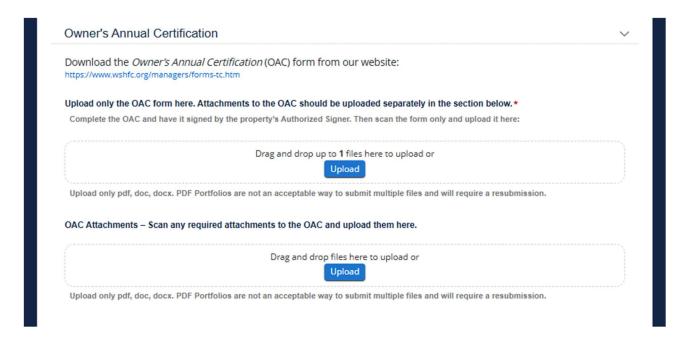


In each section, upload the required files.

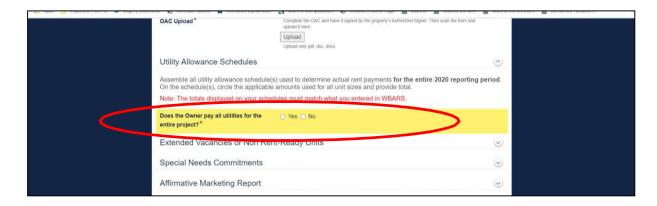
NEW THIS YEAR: There is a dedicated area to upload a Report Cover Letter and the Report Checklist. These are optional.



NEW THIS YEAR: There is a separate upload area for the OAC, and any attachments to the OAC. Attachments may include Building Code Violations, Fair Housing Complaints, explanations or supporting documentation. Please upload attachments separate from the OAC form. Note: **Special Needs Vacancy Reports** and **Homeless/Transitional Reports** should be uploaded in the corresponding area under Special Needs Commitments.



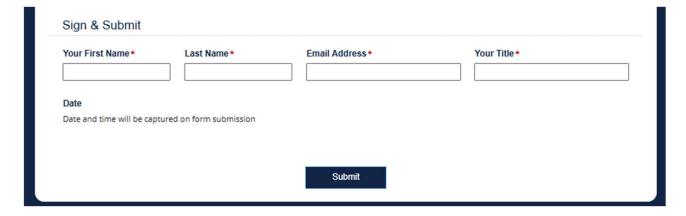
Some sections will require you to answer a question before determining whether you need to submit certain forms. An example of this is the Utility Allowance Schedules section:



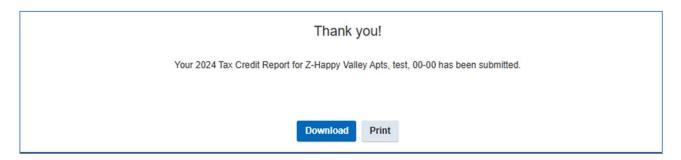
If you answer "Yes", then the form will not require you to upload any utility allowance schedule files. If you answer "No", then the form will provide an Upload button so you can submit the required files:



Once you have answered all required questions and attached all relevant documents, you can sign and submit the form to the Commission.



When you click "Submit" – if you do not have any errors preventing the submission – you will see a "Thank You" screen (with 2025 in the message):



This is your confirmation that your materials have been successfully submitted to the Commission. Please Download or Print this message and retain for your records. **Don't forget to submit Table 1** and **Table 5 in WBARS to complete your annual report submission**. Commission staff will review your submission and follow up with you if they need corrections or additional documentation.