

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



WASHINGTON STATE
HOUSING FINANCE
COMMISSION

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:

Property Information

Property Name, City, OID# *

Proceed if the Property Name, City, and OID below are correct. If they are not, then please select the correct Property in the list above.

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.

Property Name

Abbell Portfolio

Property City

SeaTac

OID Number

20-32A-B

WSHFC Portfolio Analyst

Lanakay Lipp

Report Type

On-Site Tax Credit Inspection

Reporting Year

2025

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:

Report Cover Letter & Checklist



Owner's Annual Certification



Utility Allowance Schedules



Special Needs Commitments



Affirmative Marketing Report



Average Income Test Worksheet



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.

Report Cover Letter & Checklist

Report Cover Letter (optional)

If you wish to send us an explanation or additional information regarding your submission.

Drag and drop up to 1 files here to upload or

Upload

Upload only pdf, doc, docx. PDF Portfolios are not an acceptable way to submit multiple files and will require a resubmission.

Report Checklist (optional)

If you wish to submit the Report Checklist, please do so in this area.

Drag and drop files here to upload or

Upload

Upload only pdf, doc, docx. PDF Portfolios are not an acceptable way to submit multiple files and will require a resubmission.

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.

Owner's Annual Certification

Download the *Owner's Annual Certification* (OAC) form from our website:

<https://www.wshfc.org/managers/forms-tc.htm>

Upload only the OAC form here. Attachments to the OAC should be uploaded separately in the section below.*

Complete the OAC and have it signed by the property's Authorized Signer. Then scan the form only and upload it here:

Drag and drop up to 1 files here to upload or

Upload

Upload only pdf, doc, docx. PDF Portfolios are not an acceptable way to submit multiple files and will require a resubmission.

OAC Attachments – Scan any required attachments to the OAC and upload them here.

Drag and drop files here to upload or

Upload

Upload only pdf, doc, docx. PDF Portfolios are not an acceptable way to submit multiple files and will require a resubmission.

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:

OAC Upload *

Complete the OAC and have it signed by the property's Authorized Signer. Then scan the form and upload it here:

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 only pdf, doc, docx

Extended Vacancies or Non Rent-Ready Units

Special Needs Commitments

Affirmative Marketing Report

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

Sign & Submit

Your First Name *

Last Name *

Email Address *

Your Title *

Date
 Date and time 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 2025 in the message):

Thank you!

Your 2024 Tax Credit 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. 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.