

WSHFC Annual Bond Compliance Reports Preparation and Submission Instructions

REPORTS DUE 01/7/2024

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 2023

SUBMISSION INSTRUCTIONS ON THE FOLLOWING PAGE

SUBMIT YOUR ANNUAL REPORT MATERIALS

Submit materials electronically using our online portal:

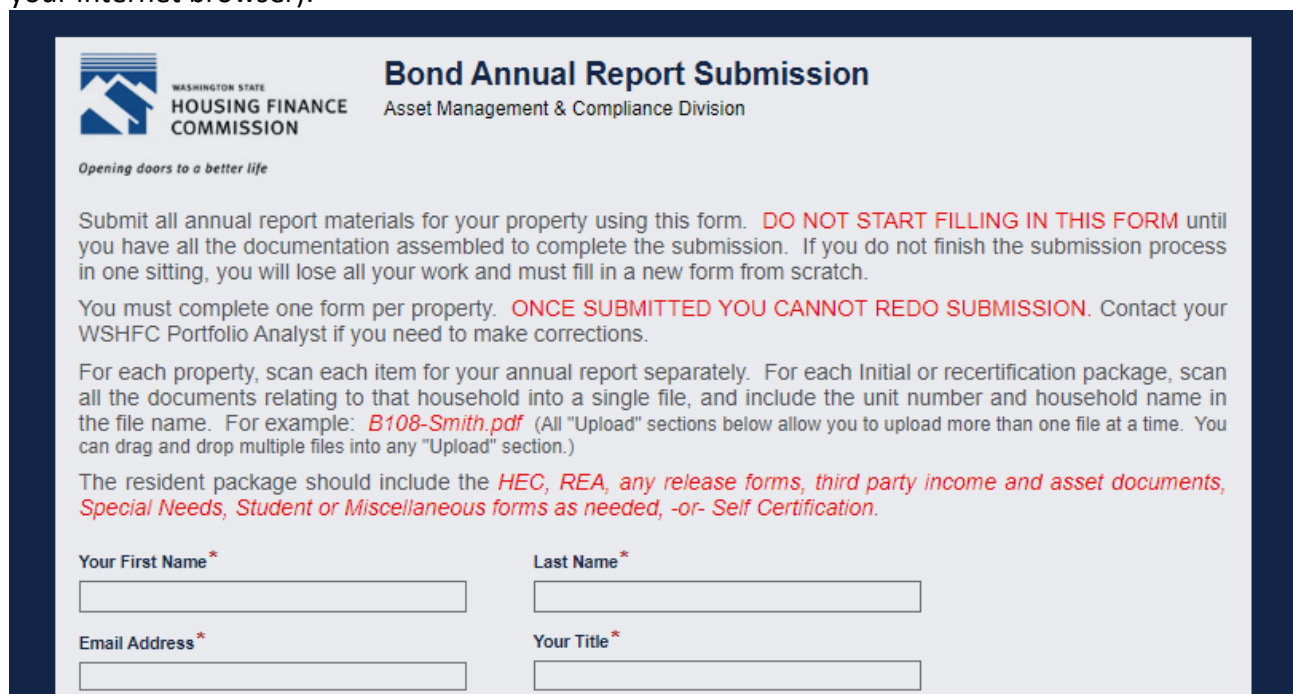
<https://portal.wshfc.org/Forms/AMC-BondReport>

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 top portion of a web form titled "Bond Annual Report Submission" from the Washington State Housing Finance Commission. The form includes a logo, a header with the title and division name, and several paragraphs of instructions. At the bottom, there are four input fields for user information, each with a red asterisk indicating it is required.

WASHINGTON STATE HOUSING FINANCE COMMISSION
Asset Management & Compliance Division

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.

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.*

Your First Name*

Last Name*

Email Address*

Your Title*

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

A screenshot of a form with four input fields. The first two fields are 'Your First Name*' and 'Last Name*', both containing the text 'Melissa' and 'Donahue' respectively. The third field is 'Email Address*' containing 'melissa.donahue@wshfc.org'. The fourth field is 'Your Title*' containing 'Property Manager'. The 'Your Title*' field is highlighted in yellow.

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:

A screenshot of a form section titled 'Property Information'. It features a single drop-down menu labeled 'Property Name, City, OID#*' with the selected value 'Sunrise Court, Aberdeen, 90-05B'. The entire section is highlighted in yellow.

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:

A screenshot of a form section titled 'Property Information'. It shows the 'Property Name, City, OID#*' drop-down menu with 'Sunrise Court, Aberdeen, 90-05B' selected. Below it, the 'OID Number' field is auto-populated with '90-05B'. The 'WSHFC Portfolio Analyst' field is a drop-down menu with 'Michael Soper' selected. The 'Property Name, City, OID#*' field is highlighted in yellow.

In the next field, 2023 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.

A screenshot of a form section titled 'WSHFC Portfolio Analyst' with 'Michael Soper' selected in a drop-down menu. Below it is the 'Reporting Year' field, which is a drop-down menu with '2023' selected. Underneath the 'Reporting Year' field, it says 'Reports from 1/1/2023 - 12/31/2023'. The 'Reporting Year' field is highlighted in yellow.

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.

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 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 only pdf. PDF Portfolios not acceptable.

Bond Part A/CCPC

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

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

Sign and Submit

Date Date will be captured on form submission

Signature*

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

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

Affirmative Marketing Report

Bond Part A/CCPC

Bond Part B

Sign Document ✕

Type Draw

Style ▾

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

Sign Document ✕

Type Draw

Style ▾

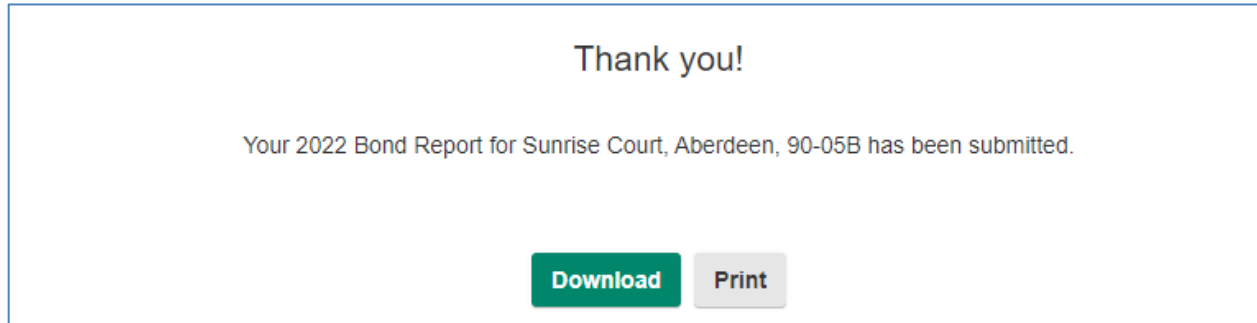
Melissa Donahue

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



The screenshot shows a web form titled "Sign and Submit". It includes fields for "Date" (with a note "Date and time will be captured on form submission"), "Reporting Year (?)" (set to "2020"), and "Signature*". The signature field is highlighted in yellow and contains a handwritten signature "Melissa Donahue". Below the signature field is a blue "Submit" button, which is circled in red.

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):



The screenshot shows a confirmation screen with the heading "Thank you!". Below the heading is the message: "Your 2022 Bond Report for Sunrise Court, Aberdeen, 90-05B has been submitted." At the bottom of the screen are two buttons: "Download" (green) and "Print" (grey).

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.