# Oev Co COMPLIANCE USER GUIDE





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web www.ohiohome.org | tollfree 888.362.6432

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# INTRODUCTION

This guide is to assist you through our Online DevCo System. It is a general procedure guide. The screens may change due to updates. This guide focuses on compliance and will take you through the registration of your organization and getting permissions to your projects through finalizing a project.

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For questions or issues please contact the DevCo Helpdesk at <u>https://devco.ohiohome.org/devcoinquiries</u>.







### **ACCESSING AND REGISTERING IN DEVCO**





### I. ACCESSING AND REGISTERING IN DEVCO

DevCo Online is an online database that allows for the management of compliance properties & applications for allocations. This section focuses on the access and registration for compliance staff of properties with OHFA funding.

- OHFA allows Owner access by granting an organization code
  - Online Property Owner is either defined by
    - General Partner -or-
    - Managing Partner if part Owner
- Owner grants access to other users by approving requested access such as Management Companies or Syndicators.

### Registering in DevCo

- · All contacts need to register to use the system
- The Owner needs to request Online-Property Owner before any additional access can be requested
- All other users, including management, will register and be managed by the Online-Property Owner
- Each organization should use their organization information when registering.
- Role User has at property with corresponding DevCo Property Access Type and who approves each Type:



#### Step 1: Enter DevCo Online Management System

https://devco.ohiohome.org/AuthorityOnline/Default.aspx

- Notice: the various Browsers that support the Online System
  - Compatible with Mozilla Firefox, Google Chrome and Internet Explorer.
- Select: New User? Register here

	DevCo Online Management System
This site will allow o of the features of this work more closely w	rganizations working with the Ohio Housing Finance Agency to manage information about their awards. A couple s site are claims management and Owner Certifications. This site continues to be expanded to allow our partners t ith us and to streamline our processes.
Username:	New User? Register Here.
Password:	Login rd?





#### Step 3: Fill in the Profile Information

- Name
- · Email your username defaults to your email address. You can change this to whatever you prefer.
- Password

#### Step 3: If you know your Organization Code (a code that is generated in DevCo)

- Enter the Code and Select: Load
- · Organization information will auto populate from DevCo
- · Check for errors in the Organization information, if there are errors use the DevCo Helpdesk at https://devco.ohiohome.org/devcoinquiries
- If you <u>Do Not</u> have the Organization Code
  - Check the box: "My organization is not registered"
  - Manually add the Organization information below it

	Registration In order to gain access your organization is al organization or the HF Profile Information	s to this website, you must request it ar ready registered, please enter your or A. This code will ensure that your regi	nd have it approved by the ganization code which you stration can be processed	e State. Please enter the following information: If u can obtain from another user at your more quickly.	
	First Name:	Amelia	If your organization is a	Iready registered, please enter your	
	Last Name:	Smith	organization code which you can obtain from another user at your organization or the HFA. This code will ensure that your registration		
	E-mail: NOTE: It their bus	is recommended that new users use iness email address.	Enter Organization Cod	e duickly. le: C33210E3A0 Load	
		devcohelp@ohiohome.org	My Organization is not r	registered	
	Username:	amelia2	Organization ———		
			Name:	Spirit of St. Louis Management (te	
	Password:	•••••	Address:	250 Third Avenue North	
	Confirm Password	: •••••	City:	Minneapolis	
			State:	MN	
**Passwords m	nust be at least 7 cl	naracters	Zip Code:	55401-1641	
and contain one	e number		Telephone:	(323) 481-8103	
			Fax: (optional)		
				Manually Compl	
				(IT NO Org. Code)	

#### Step 4: Select the appropriate Access Types for the Online- Property Owner:

**Online-Property Owners should request:** 

- Manage your Organizations Information and Users this will allow you to manage the information about your organization such as contact information, users, partnerships and partners.
- Annual Owner Certification and 8609 Access for Rental Housing this will allow you to manage information about projects/ developments you are affiliated with; e.g., the completion of Annual Certifications and Tenant Income Certifications.
- · All others only need to request Annual Owner and Tenant Income Certifications. See Step 6 for more details on property access types.

(If access to more than one organization is needed, see Section IV Accessing More than One Organization to add another organization after registration is complete)

The following access type does not affect compliance, but is part of the choices:

 Online Application Access for Developers Only - a Planning and Development type of access, allowing applicants to enter information online.





#### Step 5: Select: Next

Access Types
Please check the box next to the type of access you are requesting. You should <i>only</i> request access to the program(s) that you are <i>directly</i> involved in. If you request access for a program that you are not involved with, you may find that your request will be denied for all programs.
Annual Owner Certification and 8609 Access for Rental Housing
Manage your organizations information and users
Online Application Access for Developers Only
Cancel Next

#### Step 6: Owner Certification (Property) Access

(Appears after clicking on Annual Owner Certification and 8609 Access for Rental Housing)

Add project numbers you are affiliated with one at a time

- Enter Award Number/Project Number
- Select your role:
  - Owner Used by contacts for the owner of the property
  - Additional Access Types: Property Manager and Other should be used by the managers or syndicators asking for access <u>from</u> the Online Property Owner
- Select: Add
- Repeat above for each project
- Select: Next







### Property Access Groups Defined:

- Online- OC Editor
  - Edit and View Tenant Events
  - Edits and View Annual Reports
- Online- OC Viewer
  - View Tenant Events
  - View Annual Reports
- Online- Property Owner We recommend one per project
  - Overseer of Organization & Properties
  - Assign rights to managers
  - Edit & Submit Events
  - Manage Users
  - Finalize the Project

#### • Online - Property Manager

- Assign other managers (i.e. onsite) to edit events
- Edit & Submit Events
- Oversees the managers' rights in DevCo

### Access Types not Used by OHFA in DevCo:

- Online- 8609 Progress Report Editor
- Online- 8609 Progress Report Manager
- Online- 8609 Progress Report Viewer

#### Note: If you add a Project without the Owner being registered you will receive an error, please contact the owner

0	wner Certification	Access			]
Г	Property Award Numbers				i
	Add the Award Numbers for the box before clicking 'Add'.	properties you would like a	access to. Indicate whether	or not you are the owner by checking the	
	Unable to add requested Award property owner or OHFA to verify	Numbers: Either the Awar / the owner is registered.	rd Numbers was not found,	or the owner has not registered. Contact the	
	Award Number Example: 020006	Access Type		[	
		<ul> <li>Owner</li> <li>Property Manager</li> <li>Other</li> </ul>	Add	<b>OHFA Recommends:</b> Property Mar Online-Property Manager or OC Edit Syndicators use OC Viewer access.	agers use or. Investors,
	Cancel Next				

#### Step 7: Complete the Manage your Organization Information Screen

- (Appears after clicking on Manage your Organization Information)
- For Owners:
  - Use dropdown to pick Organization Role: Owner
  - Other roles in dropdown are if you have a manager or syndicator who wants to view/edit the organization information not just projects or for the online application.
- For Managers or Other users:
  - Use dropdown to pick Organization Role: Management (or other applicable)
  - Select: Add
- Select: Any additional roles and Add
- Once finished, Select: Next







#### Step 8: Select: Submit

- A message will appear stating you may have to wait up to 3 business days for approval
- · An email will be sent to the same email account you registered with; approving or denying your request for access

Registration Summary	]
Please Review the following information before submitting your registration request	
User Information         First Name:       Amelia         Last Name:       Smith         E-mail:       housinglocator@gmail.com         Username:       amelia2	
Organization Details         Organization Code:       C33210E3A0         Name:       Spirit of St. Louis Management (test)         Address:       250 Third Avenue North         City:       Minneapolis         State:       MN         Zip Code:       55401-1641         Telephone:       (323) 481-8103         Fax:       Fax:	
Annual Owner Certification and 8609 Access for Rental Housing          Project Number       Owner         079999       Owner         Manage your organizations information and users       Organization Role:         Organization Role:       Owner	<b>NOTE:</b> One account can be registered as the user for multiple projects.
Cancel	

 Return
 Your registration information has been submitted and is being processed.

 An email notification will be sent to you upon approval or denial.

 Please be aware that your request may take up to 3 business days to be processed.





#### Step 9: Check your email for access information

The online system will send an email similar to the examples below whenever access is approved or denied:

• Granting access to your Organization as an Administrator



- Denying or Approving Access to a specific project
  - Contact the DevCo Helpdesk at <a href="https://devco.ohiohome.org/devcoinquiries">https://devco.ohiohome.org/devcoinquiries</a>

•	noreply@ohiohome.org to me  ਦ
	This email is being sent from an unmonitored account. Please do not reply to this message.
	You have been denied access to 079999.

- For Management: Access is owner driven, please contact the owner to have your access approved.
- · For Users with view only access: Access is owner driven, please contact the owner to have your access approved.
- For **Owners**: If you do not receive an email message within 3 business days please check your same folder then use the DevCo Helpdesk at <a href="https://devco.ohiohome.org/devcoinquiries">https://devco.ohiohome.org/devcoinquiries</a>.

#### Step 10: Log into DevCo Online

• If your initial access has not been approved you will get an error message that your login information is invalid.

	DevCo Online Management System
This site will of the feature work more c Username:	allow organizations working with the Ohio Housing Finance Agency to manage information about their awards. A couple es of this site are claims management and Owner Certifications. This site continues to be expanded to allow our partners to losely with us and to streamline our processes.
Password: Forgot Your	Login Password?





#### Step 11: Read and select "I agree" or the process will not move past this screen

- A message will appear once you login
- If you click on "I Disagree" it will take you to the log-in screen shown above

I affirm that I am an employee or designated user for the organization that I am associated with as listed above. I agree to utilize this application and the data that I access for no purpose other than the submission of information to this agency as it directly relates to my job. I agree to adhere to all privacy and data security policies of this agency and my organization. I affirm that any personal information or private information that is obtained through this web application will not be used for purposes other than its intended use and I will not forward or publish this information submitted into the Ohio Housing Online Management System by me is true, accurate, and complete. I understand that any information, documentation, etc., submitted by me is related to programs that are funded with federal and state funding sources, and any false claims, statements, documents, falsifications, or concealment of material fact(s), may be prosecuted under applicable federal and state laws and may result in criminal and/or civil penalties.
18 U.S.C. § 1001, "Fraud and False Statements," provides among other things, in any matter within the jurisdiction of the executive, legislative, or judicial branch of the Government of the United States, anyone who knowingly and willfully: (1) falsifies, conceals, or covers up by any trick, scheme, or device a material fact; (2) makes any materially false, fictitious, or fraudulent statement or entry; shall be fined under this title, and/or imprisoned for not longer than five (5) years.
I have read and agree to these terms as listed above.

• After Selecting: **I agree**; the Programs Screen will appear similar to the screen below

My Profile	Programs	
	Tenant Income Certification/Owner Certification	This will allow a property manager to complete Tenant Income Certifications and Owner Certifications for Housing Credit, HOME, OHTF, and other OHFA multifamily programs.
	Progress Report	This will allow the owner or developer to enter the progress report.
	My Organization	Manage the information about your organization such as contact information, users, partnerships, and partners.
	My Profile	Manage your profile including your password, contact information, your organization information, and other information about your organization.
	Many features of the DevCo Online sys with another organization or with some your profile screen on the 'My Organiza	tem are based your organization. In some cases, you may need to share your 'Organization Code' one in your organization who is registering as a new user. This organization code can be found from tion' page.





#### Step 12: Programs Screen Overview (homepage)

- Once you select "I agree": The Program Screen should look similar to the example below based on your access rights (Annual Owner Certification and 8609 Access for Rental Housing & Manage your organizations information and users)
  - Tenant Income Certification/Owner Certification View and add project information
  - Progress Report 8609 progress reports
  - My Organization View organization information
  - My Profile Where you can add projects that you need to access
- DevCo has 60 minute work sessions
  - There is a countdown timer in the right hand corner
  - When the session expires, a message will appear asking if you would like to refresh your session
  - If you do not refresh; the system will log you out













# II. MANAGE (PROPERTY) USERS

Users with online owner or property manager access are responsible for approving access for their properties.



Step 1: Make sure you are on the Correct Organization, if you are managing more than one.



- The organization can either be viewed under My Profile or Properties Listing (Tenant Income Certification/Owner Certifications)
- To change your organization, go to Profile: Change Organization
- · Highlight the Organization you want
- · Check for errors in the Organization information
  - If there are errors use the DevCo Helpdesk at <u>https://devco.ohiohome.org/devcoinquiries</u>
- Select: Set







#### Step 2: From the Programs Screen; Select: Tenant Income Certification/Owner Certification

- Double click on the Project
- · If you have more than one project you will have to manage the users for each project separately

#### Step 3: Select: Manage Users from the Side Panel

Return to Property Listing	Property Details There is 1 error for this property	erty. Clic	k to display.						
Forest G Run (TEST)	Forest G. Run (TEST)			0	HFA			Utility Al	lowances
■ OH-88-02000	57 East Main Street							Import	Events
OH-88-02001	Columbus OH, 43215			S	cattered Site:	No		Export	Events
								Remove	Property
	Program		Award Numb	er	Award Date	Buildings	Units		
	HDAP-LIHTC(HOME)		F-A-10	-999-99	1/18/2011	0		5	
	LIHTC - Competitive			199999	1/5/2011	2		5	
	Restriction Type:	Rent a	and Income	FI	oating Units:	True			
	Owner Certification Year:	2014		Ľ	dended Ose Dales	».			

#### Step 4: Review Current Users

- · Current Users will be shown in the upper area of the screen
- The access given is highlighted in blue
- You can Update or Remove access with the buttons to the right

All Access Groups that are available in the drop down box include:

#### 8609 Related Access (Note: this group is not used)

- Online- 8609 Progress Report Viewer
- Online- 8609 Progress Report Editor
- Online- 8609 Progress Report Manager

#### Annual Reporting/ Compliance Related

- Online- OC Editor
- Can edit Tenant Events (TICs) in DevCo
- Online- OC Viewer
  - Can view Tenant Events and Annual Certification in DevCo
- Online- Property Manager

Can approve some access to properties, complete Tenant Events, and edit the Annual Certification

Online- Project Owner
 Same access as manager & can submit Annual Certifications, Finalize Year, and approve organization access

#### Step 5: Review Users that requested access

- · User Access Requests will be shown in the lower area of the screen
- You can Approve or Deny with the buttons to the right
  - Highlight the Access Groups and Select Approve or Deny
- · An email will be sent to the address on the screen approving or denying access
  - Note: There may be a time delay or the email could get stuck in a spam folder. If they need to know immediately that they have access, contact them separately from the automated email.

– User Access R	equests ——		
Last Name	First Name	Email Address	Access Groups
Smith	Amelia	ohiohousinglocator@gmail.com	Online – 8609 Progress Report Viewer Online – 8609 Progress Report Editor Online – 8609 Progress Report Manager Online - OC Editor





💁 Dev Co



### **VIEWING AND ADDING ADDITIONAL PROJECTS**







# **III. VIEWING AND ADDING ADDITIONAL PROJECTS**

A. View Projects for which you have DevCo approved permissions:

#### Step 1: From the Programs Screen Select: Tenant Income Certification/Owner Certification



- The Properties Listing Screen Appears
  - This will show you the projects for which you have approved access
  - If you do not see any properties listed or a property is missing contact the DevCo Helpdesk at <u>https://devco.ohiohome.org/devcoinquiries</u>
- To view a property, click the link to the property for the reporting year (Eff Date) that you want to view or edit
- From this screen you can also view My Profile, Return to Programs Listing (homepage), and Request another Property

Request another property My Profile Return To Programs Listing	Properties Listing					
	Earhart Properties (test) 23 Test St Cleveland OH 43215-6906 Show All Owner Certificates					
	Properties Assigned to you:	E		A	N	N
	Property Name V	Eff Date	Status	Award Number	Num Buildings	Num Units
	Forest G. Run (TEST)	2013 A	Active	F-A-10-999-99, 199999	2	5
	Forest G. Run (TEST)	2014 A	Active	F-A-10-999-99, 199999	2	5
	Lindbergh Estates (Test)	2013 A	Active	070050	3	13
	Lindbergh Estates (Test)	2014 A	Active	070050	3	13
	Salmon Chase Acres (Test)	2013 A	Active	N-B-111-1, 079999	5	50
	Salmon Chase Acres (Test)	2014 A	Active	N-B-111-1, 079999	5	50
	Test Annual Certification	2013 F	Property Review	1100013	1	14
	Test Annual Certification	2014 A	Active	1100013	1	14
	Tiffin Estates Senior (Test)/ Marysville	2013 A	Active	NB555555, NB555555	4	33
	Tiffin Estates Senior (Test)/ Marysville	2014 A	Active	NB555555, NB555555	4	33

### B. Adding Additional Projects to your Properties Listing:

- There are two links as options for accessing the Property Request Screen:
- Using the link on the Property Listing page (option A) or on the My Profile Page (option B)

#### Step 1 option A: Select: Request another property on the left side panel of Property Listings

Owner Certification Access appears- begin at Step 5





My Profile	<ul> <li>Properties Listing</li> </ul>						
Return To Programs Listing	Earhart Properties (test) 23 Test St Cleveland OH 43215-6906 Show All Owner Certificates	Earhart Properties (test) 614 23 Test St Cleveland OH 43215-6906 Show All Owner Certificates					
	Properties Assigned to you:						
	Property Name 🛛 🗸	Eff Date	Status 💎	Award Number	Num Buildings	Num Units	1
	Forest G. Run (TEST)	2013	Active	F-A-10-999-99, 199999	2	5	
	Forest G. Run (TEST)	2014	Active	F-A-10-999-99, 199999	2	5	
	Lindbergh Estates (Test)	2013	Active	070050	3	13	
	Lindbergh Estates (Test)	2014	Active	070050	3	13	
	Salmon Chase Acres (Test)	2013	Active	N-B-111-1, 079999	5	50	
	Salmon Chase Acres (Test)	2014	Active	N-B-111-1, 079999	5	50	
	Test Annual Certification	2013	Property Review	1100013	1	14	
ion A	Test Annual Certification	2014	Active	1100013	1	14	
	Tiffin Estates Senior (Test)/ Marysville	2013	Active	NB555555, NB555555	4	33	
	Tiffin Estates Senior (Test)/ Marysville	2014	Active	NB555555 NB555555	4	33	

#### Step 1 option B: Select: My Profile from the Programs screen

· Program screen also provides access to Change your password, View your Profile, and View User Access

#### Step 2 option B: Select: Request New Access from the left hand panel under Profile

	Return To Programs	Password Reset		User Access
	Return	Current Password:		Manage your organizations information and users
	Profile	New Password:		Organization And Contacts Administrators - Date Granted: 4/2/2014
	Request New Access	nfirm Password:		View organization information and request new permissions
	Organization	Set Password		Corganization Viewers - Date Granted: 3/11/2014
	Users Affiliated Organizations	Profile Details		Online Application Access for Developers Only
	Partnerships Contacts	First Name:	Amelia	Online Application Editors
	Bank Information MOU Management	Last Name:	Earhart (Test)	Online Application Viewers
	-	Organization:	Earhart Properties (test)	
		Organization Address	s: 23 Test St	
		City:	Cleveland	
		State:	ОН	
		Zip Code:	43215-6906	
		Telephone:	(614) 466-4385	
Optio	on B	Fax: (optional)	(000) 000-0000	
		E-mail:	housinglocator@ohiohome.or	
		Username:	housinglocator	
		Update		

#### Step 3 option B: Select: Organization

• If you have more than one, select the organization associated with the property (See Section IV. Accessing More Than One Organization)

Step 4 option B: Check access for Annual Owner Certification and 8609 Access for Rental Housing, and then click Next





arhart Properties (test)							Г	
O Third Avenue North								
I I have Assessed North								Optio
o Third Avenue North							Ĺ	
inneapolis								
N								
401-1641								
23) 481-8103								
12) 333-9089								
	nneapolis N 401-1641 23) 481-8103 12) 333-9089							

#### Step 5: Fill out Owner Certification (Property) Access

Appears after clicking on Annual Owner Certification and 8609 Access for Rental Housing

• Add project numbers you are affiliated with one at a time

- Enter Project Number, aka OHFA tracking number
- Select your role: Owner, Property Manager, Other
- Select: Add

	Owner Certification Access
HTC Award Number: OHFA tracking number	Property Award Numbers
Gap Only Award Number: Grant Agreement Number (HOME or Trust)	Award Number Example: 020006 Access Type 0799999 Owner Property Manager Other
	Cancel Next

Repeat above for each project

**Note:** When adding projects do approximately 5 at a time or you may receive an error, and if more properties need to be added see Section III. Viewing and Adding Additional Projects. You will have to wait until access is approved for the initial properties requested are approved before requesting access to others.

Select: Next







**Note:** If you add a Project without the Owner being registered you will receive an error, please contact the owner:

Owner Certification	Access	
Property Award Numbers		
Add the Award Numbers for the box before clicking 'Add'.	properties you would like acc	ess to. Indicate whether or not you are the owner by checking the
Unable to add requested Awar property owner or OHFA to ver	d Numbers: Either the Award N fy the owner is registered.	umbers was not found, or the owner has not registered. Contact the
Award Number Example: 020006	Access Type	
	Owner  Very Manager  Other	Add
Cancel Next		

#### Step 6: The Registration Summary Screen will appear; Select: Submit

A confirmation message appears at the bottom of the screen if you have successfully completed the new request



#### Step 7: Check your email for access information

- For Management: Access is owner driven, please contact the owner to have your access approved.
- · For Users with view only access: Access is owner driven, please contact the owner to have your access approved.
- For Owners: If you do not receive an email message within 3 business days please check your spam folder then use the DevCo Helpdesk at <u>https://devco.ohiohome.org/devcoinquiries</u>

#### Step 8: From the Programs Screen; Select: Tenant Income Certification/Owner Certification

- The Properties Listing Screen Appears
  - This will show you the projects for which you have approved access

Request another property My Profile	Properties Listing						
Return To Programs Listing	Earhart Properties (test) 23 Test St Cleveland OH 43215-6906 Show All Owner Certificates Properties Assigned to you:		614-466-4385				
	Property Name V	Eff Date	Status 🗸	Award Number	Num Buildings	Num Units	
	Forest G. Run (TEST)	2013	Active	F-A-10-999-99, 199999	2	5	
	Forest G. Run (TEST)	2014	Active	F-A-10-999-99, 199999	2	5	
	Lindbergh Estates (Test)	2013	Active	070050	3	13	
	Lindbergh Estates (Test)	2014	Active	070050	3	13	
	Salmon Chase Acres (Test)	2013	Active	N-B-111-1, 079999	5	50	
	Salmon Chase Acres (Test)	2014	Active	N-B-111-1, 079999	5	50	







### **ACCESSING MORE THAN ONE ORGANIZATION**





### **IV. ACCESSING MORE THAN ONE ORGANIZATION**

• To be used when you are working at or affiliated with multiple organizations

#### Step 1: Select: My Profile

My Profile	Programs	
	Tenant Income Certification/Owner Certification	This will allow a property manager to complete Tenant Income Certifications and Owner Certifications for Housing Credit, HOME, OHTF, and other OHFA multifamily programs.
	Progress Report	This will allow the owner or developer to enter the progress report.
	My Organization	Manage the information about your organization such as contact information, users, partnerships, and partners.
	My Profile	Manage your profile including your password, contact information, your organization information, and other information about your organization.
	Many features of the DevCo Online with another organization or with so your profile screen on the 'My Organ	system are based your organization. In some cases, you may need to share your 'Organization Code' meone in your organization who is registering as a new user. This organization code can be found from ization' page.

#### Step 2: Select: Request New Access

Return To Programs	Password Reset		User Access
Liburiy	Current Password:		Manage your organizations information and users
Return			
Lisor Dotaile	New Password:		Organization And Contacts Administrators - Date Granted: 4/2/2014
Request New Access Change Organization	Confirm Password:		View organization information and request new permissions
Organization	Set Password		✓ Organization Viewers - Date Granted: 3/11/2014
Information			
Users Affiliated Organizations	Profile Details		Online Application Access for Developers Only
Partnerships Contacts	First Name:	Amelia	Online Application Editors
Bank Information MOU Management	Last Name:	Earhart (Test)	Online Application Viewers
	Organization:	Earhart Properties (test)	
	Organization Address	s: 23 Test St	
	City:	Cleveland	
	State:	OH	
	Zip Code:	43215-6906	
	Telephone:	(614) 466-4385	
	Fax: (optional)	(000) 000-0000	
	E-mail:	housinglocator@ohiohome.or	
	Username:	housinglocator	
	Update		
	The second s		

#### Step 3: Choose "Unlisted" under Organization drop down

Request New Access	
Please select the organization you are requestin You should <i>only</i> request access to the program(s involved with, you may find that your request will	g access to and then check the box next to the type(s) of access you are requesting. ) that you are <i>directly</i> involved in. If you request access for a program that you are not be denied for all programs.
Organization: Earhart Properties (test)	T
Organization OHFA Test Organization, Ltd. Unlisted. Organization Code: Doble of Dobl	





#### Step 4: Add in the Organization Code or fill in the Organization Details.

- The organization must be registered to move past this screen
- Use the organization code to request access
  - If you do not have your organization Code, checking the box for My Organization is not registered will enable you to request access to this project
    - Enter Organization Details

	Request New	Access			
	Please select the orgar You should only reque involved with, you may	nization you are requesting acce st access to the program(s) that find that your request will be de	ess to and you are <i>di</i> nied for al	then check the box next to the type(s) <i>rectly</i> involved in. If you request acces I programs.	of access you are requesting. ss for a program that you are not
	Organization: Unlisted	d	¥		
	Organization Code: BA	AFDD64D0	load		_
	My Organization is not registered 🔲 🖌			When you click this	
	Organization Details			<ul> <li>box, you can register</li> </ul>	
	Organization Code:	BAAFDD64D0	1←	the organization	
	Name:	Spirit of St. Louis (test) LP		by putting in the	
	Address:	250 Third Avenue North		correct mormation	]
	City:	Dublin			
	State:	OH			
	Zip Code:	43215			
	Telephone:	(323) 481-8103			
	Fax:				
Request the Manage your Organization	Programs that you co	urrently have an active request f	or will not	appear in the list.	
access type	🔲 Annual Owner C	ertification and 8609 Access for	Rental Ho	busing	
	Manage your org	panizations information and use on Access for Developers Only	ſS		
	Cancel				

- Check for errors in Organization info, If there are errors use the DevCo Helpdesk at <a href="https://devco.ohiohome.org/devcoinquiries">https://devco.ohiohome.org/devcoinquiries</a>
- Select: Access Types needed
  - If you select Annual Certification and 8609 Access for Rental Housing you can also request properties during this process
- Select: Next

### Step 5: Enter your organizational role

- Choose your role from the drop down box
- Select Add
- Select Next
- You will see a receipt for your registration

Manage your Org	anization	Information
Organization Roles		
Owner	¥	Add
Organiz	ation Role	
Owner		Remove
Cancel	>	

Return Your registration information has been submitted and is being processed. An email notification will be sent to you upon approval or denial. Please be aware that your request may take up to 3 business days to be processed.





#### Step 7: Check your email for access information

- For Management: Access is owner driven, please contact the owner to have your access approved.
- For Users with view only access: Access is owner driven, please contact the owner to have your access approved.
- For **Owners**: If you do not receive an email message within 3 business days please check your spam folder then use the DevCo Helpdesk at <a href="https://devco.ohiohome.org/devcoinquiries">https://devco.ohiohome.org/devcoinquiries</a>

#### Step 6: Once you have gained access

- You can change which organization you are affiliated with by:
  - Selecting: Change Organization from your Profile
  - From the Drop Down pick which organization you want
  - Select: Set
- Your current organization will be listed at the top of the page

Return To Programs Listing	Current Organization: Spirit of St. Louis Management (test)
Return Profile User Details Request New Access Change Organization	Spirit of St. Louis Management (test)  Spirit of St. Louis (test) LP Spirit of St. Louis Management (test)
Information Users Affiliated Organizations Partnerships Contacts Bank Information MOU Management	





### ADDING UTILITY ALLOWANCE(S) TO A PROJECT





# V. ADDING UTILITY ALLOWANCE(S) (UA) TO A PROJECT

- Due to limitations in DevCo you must enter UAs annually even if the effective date is unchanged.
  - Unless updated, the last effective UA will appear in the dropdown box of the TIC
  - UA(s) entered in the system remain active for one year; if another one is effective before that timeframe- they both will show

#### Step 1: Go to the Property Details Screen

- · Select: Tenant Income Certification/Owner Certification from the Program Screen
- Select: A Project you want to add the utilty allowance

#### Step 2: Click on Utility Allowance

				_				
Return to Property Listing	Property Deta	ils						
Manage Users								Litility Allowane on
View Documents	TEST- Salmon Chase	Acres II-PC					9	Ounity Anowances
TEST- Salmon Chase Acres II-PC El OLI 07 44442	DBA: liftin Acres (test)	NOTINO			0		0	Import Events
OH-07-11112	123 Kirker Way_TEST	NGTHIS			Compliance.	Analysi. Michelle	Carroli	Export Events
OH-07-11114	Lancaster On, 43130				Scallered Sit	e. 110		Remove Property
OH-07-11115      OH-07,11116      OH-07,11116	Program		Award Number		Award Date	Buildings	Units	
	HDAP-LIHTC(HOME)		N-B-07-1	111	1/1/2012	5	48	
	LIHTC - Competitive		079	999	5/28/2007	0	10	
	TCE-1602		TCE-07-9	999	12/21/2015	0	0	
	Restriction Type:		Rent and Income		Floating Unit	s: True		
	Rental Assistance:		Property Based		Extended Us Dates:	e 4/15/20	15, 4/30/2015	
	Owner Certification Yes	ar:	2016					
	Owner Entity Informa	ition ———						
	Name	TEST -	Earhart Properites (G	Tax I	ID Number			
	Address	57 East	Main Street	P	rimary Owner Cor	ntact		
	Address 57 Eas		57 East Main Street		lame	Test User		
	City	Minnea	Minneapolis	E	mail	ohfatestuser@		
	State	MAN			bono	(614) 005 1209	gman.com	
	State	IVIIN			none	(014) 555-1200	, ,	
	Zip	55401			ax	(000) 000-0000		
	Management Comp	any — —						
	Name	TEST- Spi	rit of St. Louis Mar	- Prim	ary Management	Contact		
	Address	57 East M	ain Street	Nam	ie			
	City	Minneapol	is	Ema	il			
	State	MN		Phor	ne			
	Zip	55401		Fax				
	On-Site Property Manager:		C	n-Site	Phone:			

#### Step 3: Either Add New or Copy

- The current UAs and the UAs from the previous two reporting years will be displayed in the list on the Utility Allowance screen.
- Add New
  - This will add a blank screen to enter data in
- · See Step 8 for copying a UA from one reporting year to the next
  - Replicates the record so you can do minor updates, e.g., effective date change

Return to Property Detail	Utility Al	Utility Allowances								
		Description	Allowance Type	Unit Type	Effective Date	Cert Year				
	Show BINs	2 BR garden PHA 2014	Public Housing Authority	(PHA) 2 Bedroom	1/1/2014	20 4	Сору			
	Show BINs	2 BR Thome PHA 2014	Public Housing Authority	(PHA) 2 Bedroom	1/1/2014	2014	Сору			
	Show BINs	1 BR garden PHA 2014	Public Housing Authority	(PHA) 1 Bedroom	1/1/2014	2014	Сору			
	Show BINs	1 BR Thome PHA 2014	Public Housing Authority	(PHA) 1 Bedroom	1/1/2014	2014	Сору			
	Show BINs	2 BR garden PHA 2013	Public Housing Authority	(PHA) 2 Bedroom	1/1/2013	2013	Сору			
	Show BINs	2 BR Thome PHA 2013	Public Housing Authority	(PHA) 2 Bedroom	1/1/2013	2013	Сору			
	Add New	>								





#### Step 4: Fill out the general information

- The BINs (Building Identification Number) are listed to the right
- You must select the BINs to which the UA will apply before you save and exit or the info you filled in will not save • Fill in:
  - Description this is what will appear when filling out the TIC, therefore, if you have multiple types, unit styles, or 0 bedroom sizes you will want to mark the UA in a way you can tell them apart. The more descriptive the better and consistent, e.g., 2 bdrm garden PHA 1/1/14; 2 bdrm townhome PHA 1/1/14.



- Allowance Type is the Utility Allowance used
- · Verified Date date that the utility allowance was reviewed for any changes. OHFA recommends utility allowances are reviewed quarterly to insure there are no issues with Gross Rent.

Unit#	2				
Number of Bedrooms	2 Bedroom				
Event Date	12/11/2014				
Event Type	Recertify •				
Utility Allowance	2 BR garden PHA 🔻				
Total Household Income					
Rent Level %	2 BR garden PHA 2013 2 BR garden PHA 2014				
Tenant Rent Portion	2 BR Thome PHA 2014				

- Note: DevCo only requires a single verification to be 0 listed for a reporting year if there are no changes.
- Effective Date the true effective date of the UA e.g. PHA UA for Fairfield county is unchanged since March 2, 2014, but they were last reviewed January 1, 2016.



#### Step 5: Fill out specific UA type information

- **Source** From the Drop Down; Select the source for each utility type:
  - Gas
  - Electric
  - Oil
  - L.P. (liquid propane) 0
  - Other (e.g. sewer, trash)
  - All
- Amount Manually Enter
- Paid By From Drop Down; Select: .
  - Ownear Paid OHFA does not need to know how much owner pays. The Owner paid drop down is for Owner/Manager use only.
  - Tenant Paid
- Allowance Type From Drop down; Select from the accepted OHFA UAs listed.
  - HUD Rent Schedule
  - OHFA Approved Energy Consumption Model
  - OHFA Approved Consumption
  - OHFA Approved HUD Utility Model
  - OHFA Approved Utility Company Estimate
  - Public Housing Authority (PHA)
  - Rural Development
  - Owner Paid Utilities





must select BINs to save For Example; below is a sample of a PHA and a Utility Allowance filled out in Online- DevCo

Locally D	Aontgom	ery Cour	nty, OH	Unit Type			1-1-2013
Cally or Service			100	Manifoldy Dollar	Allowarces	4.00	1 2010
Heating	a. Natural Gas		33	49	56	68	79
	b. Bottle Gas		80	144	134	103	189
	c. OI / Electric		128/49	102/55	217/82	263/99	306/116
Cooking	a. Natural Gas		6	9	10	13	14
	b. Botte Gas		15	27	25	31	34
	c. OI / Electric		8	10	14	17	19
COLUMN ENGLISH	d. Coal / Other		-	-	-	-	-
Ar Conditional	-9		11	11	18	21	24
Water Heating	a. Natural Gao		8	12	13	16	17
	b. Bottle Gas		19	34	31	39	42
	c. OI / Electric		28/15	17	46/24	57/30	62/32
Water	a. Gear/Gear		24	34	30	42	40
Sever			33	28	49	66	62
Trash Collects	20		11	11	11	11	11
Range/Microw		I 1	4	4	5	6	5
Citizer - score		<b>├</b>	3	4	0	0	7
Number of Baltico					Trati Rang Rang Other	n Conection perMicrowave gerator	0 0 0 0
Utility Allowa	ance Entry	Chase Arras (Tast)	Page 1.d	8	Trata	A Constant of Manuayer product	127.00
Utility Allowa	ance Entry Salmon 2 BR g	Chase Acres (Test)	rege to	8	Turka	A Constant a Minute a product	127.00
Utility Allowa Property Name Description	ance Entry Salmon 2 BR g	Chase Acres (Test) arden PHA 2013		1	Trata Trata Rent Other Trata		127.00 Million Added Translowed Phare
Utility Allowa Property Name Description Effective Date	ance Entry Salmon 2 BR g 1/1/201	Chase Acres (Test) arden PHA 2013 13		5	Trans Trans Refer Other Trans	1.000000000000000000000000000000000000	127.00
Utility Allowa Property Name Description Effective Date Bedrooms	ance Entry Salmon 2 BR g 1/1/201 2 Bed	Chase Acres (Test) arden PHA 2013 13 com V		*	Trans References Official Trans Tran	0.000000000000000000000000000000000000	127.00
Utility Allowa Property Name Description Effective Date Bedrooms Allowance Type	Salmon 2 BR g 1/1/201 2 Bedr Public	Chase Acres (Test) arden PHA 2013 I3 room ▼ Housing Authority (	  PHA)	* *	Trans References Trans References Trans Tr	1. Construction 1. Construction 2. Constructio	127.00
Utility Allowa Property Name Description Effective Date Bedrooms Allowance Type Utility	Salmon 2 BR g 1/1/201 2 Bedr Public	Chase Acres (Test) arden PHA 2013 13 coom  Housing Authority ( Source	PHA)	• • Paid By	Trans	Allowance Type	127.00
Utility Allowa Property Name Description Effective Date Bedrooms Allowance Type Utility 1 Unit Heat	Salmon 2 BR g 1/1/201 2 Bedr Public	Chase Acres (Test) arden PHA 2013 13 Toom T Housing Authority ( Source	PHA) Amount	Paid By Tenant Paid	Public Housing	Allowance Type	127.00
Utility Allowa Property Name Description Effective Date Bedrooms Allowance Type Utility Unit Heat Water Heating	ance Entry Salmon 2 BR g 1/1/201 2 Bedr Public	Chase Acres (Test) arden PHA 2013 13 room V Housing Authority ( Source	PHA) 55.	Paid By  Tenant Paid  Tenant Paid  Tenant Paid  Tenant Paid  Tenant Paid  Tenant Paid	Public Housi     Dublic Housi	Allowance Type ng Authority (PHA)	127.00 1007.03471.125 differentiation 7420
Utility Allower Property Name Description Effective Date Bedrooms Allowance Type Utility T Unit Heat Water Heating	ance Entry Salmon 2 BR g 1/1/201 2 Bedr Public	Chase Acres (Test) arden PHA 2013 13 oom ▼ Housing Authority ( Source Electric ▼] Electric ▼]	PHA) Amount 55.0 17.0	Paid By  Tenant Paid  Tenant Paid	Public Housin     Public Housin	Allowance Type ng Authority (PHA) ng Authority (PHA)	127.00
Utility Allower Property Name Description Effective Date Bedrooms Allowance Type Utility 1 Unit Heat Water Heating Cooking	ance Entry Salmon 2 BR g 1/1/201 2 Bedr Public	Chase Acres (Test) arden PHA 2013 13 oom V Housing Authority ( Source Electric V Electric V Electric V	PHA) Amount 55. 17. 10.	Paid By Paid By Tenant Paid Tenant Paid Tenant Paid Tenant Paid		Allowance Type ng Authority (PHA) ng Authority (PHA) ng Authority (PHA)	127.00
Utility Allowa Property Name Description Effective Date Bedrooms Allowance Type Utility Unit Heat Water Heating Cooking Unit Electric	Salmon 2 BR g 1/1/201 2 Bedr Public Type	Chase Acres (Test) arden PHA 2013 13 room V Housing Authority ( Source Electric V Electric V Electric V Electric V	PHA) Amount 55. 17. 10. 34.	Paid By Tenant Paid	<ul> <li>Public Housin</li> </ul>	Allowance Type ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA)	127.00
Utility Allowa Property Name Description Effective Date Bedrooms Allowance Type Utility 1 Unit Heat Water Heating Cooking Unit Electric Water Service	Salmon 2 BR g 1/1/201 2 Bedr Public	Chase Acres (Test) arden PHA 2013 13 room ▼ Housing Authority ( Source Electric ▼ Electric ▼ Electric ▼ Electric ▼	PHA) Amount 55. 17. 10. 34. 1.	Paid By Tenant Paid Tenant Paid Tenant Paid Tenant Paid Tenant Paid Tenant Paid O Tenant Paid O O Ovner Paid		Allowance Type ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA)	127.00
Utility Allowa Property Name Description Effective Date Bedrooms Allowance Type Utility T Unit Heat Water Heating Cooking Unit Electric Water Service Sewer	Ance Entry Salmon 2 BR g 1/1/201 2 Bedr Public	Chase Acres (Test) arden PHA 2013 13 room V Housing Authority ( Source Electric V Electric V Electr	PHA) Amount 55. 17. 10. 34. 1. 1.	Paid By Tenant Paid Tenant Paid Tenant Paid Tenant Paid Tenant Paid Tenant Paid O Tenant Paid O Tenant Paid O Tenant Paid		Allowance Type ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA)	127.00 127.00
Utility Allowa Property Name Description Effective Date Bedrooms Allowance Type Utility T Unit Heat Water Heating Cooking Unit Electric Water Service Sewer	Salmon 2 BR g 1/1/201 2 Bedr Public	Chase Acres (Test) arden PHA 2013 13 coom V Housing Authority ( Source Electric V Electric V Electr	PHA) Amount 55.1 17.1 10.1 34.1 1.1 1.1	Paid By  Tenant Paid  Tenant Paid  Tenant Paid  Tenant Paid  Orner Paid  Owner Paid  Owner Paid	Public Housii	Allowance Type ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA)	127.00 127.00 1 Hadded 7 70
Utility Allowa Property Name Description Effective Date Bedrooms Allowance Type Unit Heat Water Heating Cooking Unit Electric Water Service Sewer Trash Removal	ance Entry Salmon 2 BR g 1/1/201 2 Bedr Public	Chase Acres (Test) arden PHA 2013 13 oom ▼ Housing Authority ( Source Electric ▼ Electric ♥ Electric ♥ Electr	PHA) Amount 55. 17. 10. 34. 1.0 11.0	Paid By Tenant Paid Tenant Paid Tenant Paid Tenant Paid Tenant Paid Orenant Paid Orenant Paid Orenant Paid Owner Paid Owner Paid		Allowance Type ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA)	127.00 127.00 1 Hadded 700 1 Ha
Utility Allowa Property Name Description Effective Date Bedrooms Allowance Type Unit Heat Water Heating Cooking Unit Electric Water Service Sewer Trash Removal RD or Section 8 App	ance Entry Salmon 2 BR g 11/1/20' 2 Bedr Public Type	Chase Acres (Test) arden PHA 2013 3 com V Housing Authority ( Source Electric V Electric V Electric V Electric V Cher V Cher V V	PHA) Amount 55. 17. 10. 34. 1.0 11.0	Paid By     Tenant Paid     Tenant Paid     Tenant Paid     Tenant Paid     Ornent Paid     Owner Paid     Owner Paid     Owner Paid		Allowance Type ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA)	127.00
Utility Allowa Property Name Description Effective Date Bedrooms Allowance Type Unit Heat Water Heating Cooking Unit Electric Water Service Sewer Trash Removal RD or Section 8 App Air Conditioning	Salmon 2 BR g 1/1/20 2 Bed Public Type	Chase Acres (Test) arden PHA 2013 13 room V Housing Authority ( Source Electric V Electric V Electric V Gas V Other V U	PHA) Amount 55. 17. 10. 34. 11. 11.1 11.1	Paid By Tenant Paid Tenant Paid Tenant Paid OTenant Paid OTenant Paid OTenant Paid OOwner Paid OOwner Paid OOwner Paid OTenant Paid		Allowance Type ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA) ng Authority (PHA)	127.00 127.00

Step 6: Once Data is filled out; Select: Save





#### Step 7: Make sure the new UA was added to your list.

• The current UAs and the UAs for the previous two reporting years will be displayed in the list on the Utility Allowance screen.

Return to Property Detail	Utility Allowances								
		Description	Allowance Type	Unit Type	Verified Date	Effective Date	Cert Year	1	
	Show BINs	2 BR garden PHA '16	Public Housing Authority (F	PHA) 2 Bedroom	1/1/2016	3/2/2014	2016 Copy		
	Show BINs	2 BR garden PHA '15	Public Housing Authority (F	HA) 2 Bedroom	1/1/2015	3/2/2014	2015 Copy		
	Show BINs	2 BR garden PHA 2014	Public Housing Authority (F	HA) 2 Bedroom	1/1/2014	3/2/2014	2014 Copy		
	Show BINs	2 BR Thome PHA 2014	Public Housing Authority (F	HA) 2 Bedroom	1/1/2014		2014 Copy		
	Show BINs	3 brm Garden 2014	Public Housing Authority (F	HA) 3 Bedroom	1/1/2014		2014 Copy		
	Show BINs	1 BR Flat PHA 2014	Public Housing Authority (F	HA) 1 Bedroom	2/2/2014		2014 Copy		
	Add New								

- If UA is not visible, check for UA by going back to the property listing page and Select: the reporting year (Eff Date) that
  matches the UA effective date and Select: UA button from the Property Details. If you still do not see it use the DevCo Helpdesk
  at <a href="https://devco.ohiohome.org/devcoinquiries">https://devco.ohiohome.org/devcoinquiries</a>
- An alert will then be displayed on Property Details screen to update the Utility Allowance on all units when a UA with a new Effective Date has been entered into DevCo. Note: Each current resident will need to be updated within 90 days of the Effective Date.

Property Details
Utility Allowances were recently revised. Rent Update Events MUST be completed in DevCo within 90 days of the Effective Date for all applicable units.
There are 3 issues for this property. Click to display.

#### Step 8: Copy and Update UA for New Year

- Copy replicates the record so you can do minor updates, e.g. new effective date change
- · This step described using the copy feature; however an update could be done using Add New
- Click Copy from the Utility Allowance field
- Update Utility Allowance description
- · Update the fields that have changed
  - Note: At minimum the effective date in DevCo must be updated yearly even if there has not been a new Utility Allowance published in years. If it is unchanged the only field that needs updated is the Verified Date, and it is recommended to modify the Description.
- · Double check that correct BINs are indicated
- Save the new UA
- · Review if the UA was added and switch reporting years, if needed

#### **Step 9: Owner Paid Utilities**

- Select Tenant Income Certification/Owner Certification
- Select: A Project you want to indicate Owner Paid
   Utilities on
   Buildir
- Owner Paid must be indicated on each building separately
- Select BIN
- On the Building Details screen select Owner Paic Utilities
- · Repeat selection on each building
- If events were entered before the Owner Paid UAs was indicated you will need to select each event and click update to clear the Utility Allowance error listed on the event

Building Details				
OH-88-02001		]	BIN	OH-88-02001
57-B East Main Street		]	Unit Count	10
Lucasville	OH 🗸	44691	Actual Unit Count	10
County	SCIOTO V	•	Applicable Fraction	100.00 ו
Placed In Service Date	2/5/2011			
Acquisition Date				
Owner Pays Utilities	✓			
Notes:				
				< >
Update				







### VIEWING AND ADDING PROJECT INFORMATION





### **VI. VIEWING AND ADDING PROJECT INFORMATION**

This section is broken down by each screen related to viewing and editing a property with steps using them. They incldue:

- A. Property Listings
- B. Property Details Screen
- C. Building Details Screen
- D. Unit Information Screen

#### Step 1: Select: Tenant Income Certification/Owner Certification from the Program Screen



### A. Property Listings

#### Step 2: Find and Select: the <u>Property</u> for which you want to add information

· All of the properties assigned to you are listed in alphabetical order







- You can filter using Property Name or Status by clicking on the funnel to the right of the header
  - When you click on the funnel, a blank space appears
  - Type in the property name and press Enter
  - To get back to all properties, click the funnel next to property name and delete the text and press Enter
- You can <u>sort</u> the Property Name list by clicking on the column name
  - It will sort A-Z (or)
  - Z-A
- Status: A property can be in one of six status stages:
  - Active The property is open for the certification year
  - Property Review The property is in the finalization process but can be edited
  - **Finalized** The property has been finalized for OHFA review. Editing is no longer possible for tenant events in that reporting year.
  - Monitoring OHFA reviews the property before completion
  - Resolution OHFA reviews the property before completion
  - **Completed** Finalization of the property has been approved by OHFA and property has been closed for that certification year

### B. Property Details Screen

- · Once a property is selected an overview of the Project will appear
- This Screen is Read-only, if any of the information needs updated contact the DevCo Helpdesk at <a href="https://devco.ohiohome.org/devcoinquiries">https://devco.ohiohome.org/devcoinquiries</a>
  - Programs Includes all active OHFA programs with the award number, the number of units and buildings with that funding type at the property
  - Owner Entity Information Displays the current contact information listed in DevCo for the owner
  - Management Company Displays the current contact information listed in DevCo for the Management Company including a primary contact and onsite manager







- Owner Certification Year is very important (e.g. rental & OHFA compliance events 1/1/15-12/31/15)
  - All TICs entered under this specific Property screen must have the same year (e.g. 2015)
  - An error will occur if you update a TIC with a effective date that is not in the certification year
  - If you are in the wrong certification year, you will have to go back to the Properties listing and choose the correct effective year (reporting year) for the property
- Compliance Checks Property Errors
  - A link to a collective list of warnings and errors from the property events are at the top of this screen, severities include:
    - · Errors Will not let you finalize your project at the end of the year; reflects mostly items not entered
    - Warnings Will let you finalize; reflects items that may be an issue
    - (See Section VII B. Compliance Checks Errors & Warnings for more information)
  - Select: Click to display

Return to Property Listing	Property Details			_	Link t	o warn	ings	and	errors	
Manage Users View Documents	There are 35 issues for this	s property	. Click to display.							_
<ul> <li>TEST- Salmon Chase Acres II-PC</li> <li>OH-07-11112</li> <li>OH-07-11113</li> <li>OH-07-11114</li> <li>OH-07-11114</li> </ul>	TEST- Salmon Chase Acre DBA: Tiffin Acres (test) 123 Kirker Way_TESTINGT Lancaster OH, 43130			Compliance Scattered Sit	Analyst: Mich e: No	elle Cari	roli	Utility Allowar Import Ever Export Ever Finalize Yes	nces nts nts ar	
MOH-07-11116	Program		Award Number		Award Date	Buildings	Uni	its	Annual Certific	ation
	HDAP-LIHTC(HOME)		N-B-07-11	11	1/1/2012	5		48	Remove Prop	erty
	LIHTC - Competitive		0799	99	5/28/2007	0		10		
	TCE-1602		TCE-07-99	99	12/21/2015	0		0		
	Restriction Type:		Rent and Income		Floating Unit	s: True				
	Rental Assistance:		Property Based		Extended Us Dates:	e 4/15/2015, 4/30/2015				
	Owner Certification Year:		2015							
	Owner Entity Information	ı——								
	Name	TEST -	Earhart Properites (G	Tax ID	0 Number					
	Address	57 East	Main Street	□ Pri	imary Owner Cor	ntact				
	City	Minneap	oolis	Na En	Name Test User Email obfatestuser@gmail.com					
	State	MN		Ph	ione	(614) 995-12	208			
	Zip	55401		Fa	X	(000) 000-00	000			

• You can get to each TIC with the error/warning by clicking on the link in the event column

Return to Property Detail	Property	Errors			
	Building	Unit	Description	Severity	Event
	OH-07-11112	5	Allowable Rent Exceeded	Warning	Move In - 04/12/2013
	OH-07-11112	5	Income Exceeds County AMI Income Schedule	Warning	Move In - 04/12/2013
	OH-07-11111	3	Allowable Rent Exceeded	Warning	Move In - 04/12/2013
	OH-07-11111	3	Total Household Income Is Zero	Warning	Move In - 04/12/2013
	OH-07-11112	5	Allowable Rent Exceeded	Warning	Student Update - 04/12/2013
	OH-07-11111	1	Allowable Rent Exceeded	Warning	Recertify - 05/06/2013
	OH-07-11111	1	Allowable Rent Exceeded	Warning	Move Out - 05/11/2013
	OH-07-11111	1	Allowable Rent Exceeded	Warning	Move In - 05/14/2013





Through the side panel on your left you can navigate and select specific property details: buildings, units and events.



#### Step 3: Add the Utility Allowance for the project if you have not already

(See Section V. Adding a Utility Allowance for detailed instructions)

Return to Property Listing Manage Users View Documents ETEST- Salmon Chase Acres II-PC CH-07-11112 CH-07-11113 CH-07-11114 CH-07-11114 CH-07-11114	Property Details There are 35 issues for this TEST-Salmon Chase Acre DBA: Tiffin Acres (test) 123 Kirker Way_TESTING <sup>2</sup> Lancaster OH, 43130	S s property. es II-PC THIS	Click to display.		Compliance Scattered Sit	Analyst: Miche te: No	elle Carroll	CUtility A Impo Expo Final	Allowances rt Events rt Events lize Year	Δ
	Program		Award Number		Award Date	Buildings	Units	Annual	Certification	
	HDAP-LIHTC(HOME)		N-B-07-11	11	1/1/2012	5	48	B Remov	e Property	
	LIHTC - Competitive		0799	99	5/28/2007	0	1(			-
	TCE-1602		TCE-07-99	99	12/21/2015	0	(	D		
	Restriction Type:		Rent and Income		Floating Unit	ts: True				
	Rental Assistance:		Property Based		Extended Us Dates:	<sup>se</sup> 4/15/	2015, 4/30/2	015		
	Owner Certification Year:		2015							
	Owner Entity Information	۱ <u> </u>								1
	Name	TEST - E	Earhart Properites (G	Tax ID	Number					
	Address	57 East	Main Street	⊢ <sup>Pri</sup>	mary Owner Co	ntact				
	City	Minneap	olis	Na	ime	Test User				
				En	nail	ohfatestuse	r@gmail.com	ו ו		
	State	MN		Ph	one	(614) 995-12	208			
	Zip	55401		Fa	x	(000) 000-00	000			





### C. Building Details Screen

#### Step 4: Select a BIN number you want to add information to (Side Panel)

- An overview of the building appears
- You can view and verify basic building information
  - · Verify Building Identification Number or if not a Housing Tax Credit project the Identifying Name
  - Verify Address of Building (See recommended format listed in Section VI. D. Unit Information)
  - Owner Pays Utilities- check box, if owner pays **all** utilities.
  - Notes Section is used to identify any issues or special characteristics about this particular building.
- Contact the <u>DevCo Helpdesk</u> if information is listed incorrectly.



### D. Unit Information Screen

#### Step 5: Select: the Unit you want to view

- Choose the unit from the Unit Name below the building information -or- Choose the unit from the list under the BIN on the left of the screen as shown above
- You can see an overview of the unit.

Return to Property Listing	Unit Informati	ion			]
Manage Users					
View Documents	Unit Name	10		<b>D</b>	alle a Malla a sa tha
Salmon Chase Acres (Test) OH-07-11111	Number Of Bedrooms	2 Bedroom		Kemi	nder: Make sure the
± 1 E <mark>10</mark>	Square Footage	700		marke	ed on each unit.
Add New Event	AMI Percentage	35% 🔹		hecai	ise this impacts the
<b>H</b> 3	Unit Identity	Program Unit 🔻		numh	er of qualified units on
± 4 ± 5	Status Date	09/10/2012		the Δι	onual Certification
<b>±</b> 6	Status	Occupied			
■ 7					
	Funding Program	Start Date	End Date		
OH-07-11113	LIHTC	•	06/20	5/2013	
■ OH-07-11114 ■ OH-07-11115	HOME	• 09/10/2012	06/20	5/2013	
	Update				





- Verify any information, and update as needed; such as:
  - Unit Number We have a recommeded format if your organization lists a unit number with abreviations of street names.
  - <u>Recommended Formatting:</u>
    - Abbreviate street directions as a capital letter with no punctuation (e.g. N or SW)
    - Use standard post office street abbreviations with no punctuation (e.g. St or Dr)
      - Standard abbreviations can be found here: <u>https://www.usps.com/ship/official-abbreviations.htm</u>
    - Include apostrophes, no hyphens when present in street addresses (e.g. O'Hara Ln)
    - Enter numbered streets as the number with the appropriate suffix (e.g. 1st or 133rd)
    - Capitalize the start of each word in an address (e.g. High Tree Ln)
  - Number of Bedrooms
  - Square Footage
  - AMI Percentage
  - Unit Identity Owner/manager needs to update this to communicate to OHFA which units they are.
    - Make sure the unit identity is correctly marked on each unit, because this impacts the number of qualified units on the Annual Certification
    - Program Unit (LIHTC, HOME, TCAP, etc)
    - Manager
    - Maintenance
    - Model
    - Security
    - Market
    - Note: Non-program units must be approved by OHFA
  - $\circ$   $\,$  Status Date Updates based off of the last tenant event
  - Status either Occupied or Vacant based off of current tenant events
    - Use the DevCo Helpdesk at <u>https://devco.ohiohome.org/devcoinquiries</u> if you need this updated
- Funding Program
  - If you Select: **Add Funding**, the following appears:

Funding Program	Start Date	End Date		
LIHTC •		06/26/2013		
HOME •	09/10/2012	06/26/2013		
Update				

- Since most HOME units Float; this is a good method to track them.
- Once changes are completed Select: Update
- If unit is created accidently and needs to be deleted, contact the DevCo Helpdesk









# **VII. TENANT INCOME CERTIFICATIONS**

- This section can be broken down into:
  - A. Event Details- Manually Adding TICs (current Move-ins & Recerts)
  - B. Compliance Checks Errors and Warning
  - C. Viewing & Printing the Tenant Income Certification (TIC)
  - D. Other Event Updates
  - E. Entering Historic Move-in Events

### A. Event Details- Manually Adding TICs (current Move-ins & Recerts)

Important considerations before getting started:

- If your initial information is not in DevCo, please let us know by using the DevCo Helpdesk at <a href="https://devco.ohiohome.org/devcoinquiries">https://devco.ohiohome.org/devcoinquiries</a>
- All new move-ins need a full certification
- · For Housing Tax Credits, a student status needs to be completed every year
- For HOME, follow the HOME recert schedule
- A version of the Tenant Income Certification (TIC) appears ready to be completed
- If you use Housing Tax Credit (HTC) compliance software you can upload your Tenant Information using the produced XML Files
  - Dates should import correctly based on the dates already in your HTC compliance software (See Section VIII. Using the Data Import Function (XML Upload) for more information on uploading from HTC compliance software)

Return to Property Listing	Event Details			
Manage Users	Event Detailo			
View Documents	Unit #	614		
TEST- Woodland Run-PC	Number of Bedrooms	Studio	Square footage	0
	Event Date Step 2	1/6/2016	Initial Move-in	1/6/2016
± 606 ± 607	Event Type	Move In 🗸	Step 3	Program Unit 🗸
<b>■</b> 608	Utility Allowance	~	Allowance Amount	0
■ 609 ■ 610	Total Household Income	20000.00	Household Income at Move-in	20000.00
± 611     ± 612	Rent Level %	60% 🗸	Income Level %	60%
■ 613	Tenant Rent Portion	400.00	Federal Rental Assist Amount	0.00
Add New Event Move In - 01/06/2016	Population Served	None V	Non-Federal Rental Assist Amount	0.00
15	Is Disabled		Rental Assist Type	N/A 🗸
	HH Member Count	1	Rental Assist Source	N/A 🗸
	All Student House	No 🗸	Student Count	0
		LIHTC		
	Funding Program	HOME	Student Explanation	N/A 🗸

#### Step 1: Select: Add New Event

#### Step 2: Enter the correct event date.

- Event date year must be the same as the certification reporting year you selected at the Property Listing Screen
- If you change to a different effective date while filling out your TIC, you will lose the information you are entering. You will either get a blank TIC or the last TIC entered

e.g., 3/17/2013 Event for Tiffin Acres would *have* to be entered under Tiffin Acres effective date 2013

• Tenant events must be added chronologically.





Properties Assigned to you:						
Property Name 🛛 🗸	Eff Date	Status 🗸	Award Number	Num Buildings	Num Units	*
Forest G. Run (TEST)	2013	Active	F-A-10-999-99, 199999	2	5	
Forest G. Run (TEST)	2014	Active	F-A-10-999-99, 199999	2	5	
Lindbergh Estates (Test)	2013	Active	070050	3	13	
Lindbergh Estates (Test)	2014	Active	070050	3	13	

NOTE: For acq/rehab projects with in-place residents the "move-in" date will be the date the tenant was qualified for the HTC program.

#### Step 3: Select: Event Type from dropdown

- · Fields to enter information into DevCo will vary based on the type of the event selected
- Select: either Move-in or Recertify (See Sect VII. D. Other Event Updates for more details on other types of events)
  - If the date or event type are incorrect you will need to restart the process of adding a new event.

Event Details				
Unit #	614			
Number of Bedrooms	Studio	Square footage	0	
Event Date	12/6/2015	Initial Move-in	12/6/2015	
Event Type		Unit Identity	Program Unit 🗸 🗸	
Utility Allowance	Move In Move Out	Allowance Amount	0.0	
Total Household Income	Recertify Transfer Out	Household Income at Move-in	0.00	
Rent Level %	Composition Update	Income Level %	18%	
Tenant Rent Portion	Rent Update Student Update	Federal Rental Assist Amount		
Population Served	None V	Non-Federal Rental Assist Amount		

- · A Move-in Event must be entered in DevCo online before any other type of event entered for a unit
  - If a move-in event is missing from the system, you will need to enter it from the original reporting year that the move-in occurred (See Sect VII. E. Entering Historic Move-in Events for more details)

#### Step 4: Correctly Identify the Unit Identity

· Should be listed as Program Unit unless it is a market unit or a type of employee unit

#### Step 5: Select: Utility Allowance from dropdown

- Allowance Amount will automatically populate once selection is made
- Make sure Utility Allowances are entered and available from the dropdown box
- If the utility allowance is missing go back to Property Details screen to enter utility allowance (See Section V. Adding UAs)

#### Step 6: Skip Total Household Income this will automatically populate from income calculation



	Return to Property List	ting	Event Details					
	Manage Users							
	View Documents		Unit #	614				
	E TEST- Woodland R	un-PC	Number of Bedrooms	Studio		Square footage	0	
	■ OH-88-02000 E OH-88-02001		Event Date	1/6/2016		Initial Move-in	1/6/2016	
	■ 606		Event Type	Move In	~	Unit Identity	Program Unit	•
	<b>■</b> 608		Utility Allowance		~	Allowance Amount	0	
	<b>■</b> 610	01	Total Household Income	20000.00		Household Income at Move-in	20000.00	
	国 611 国 612	Step 7	Rent Level %	60%	~	Income Level %	60%	Step 7
	■ 613	Step 8	Tenant Rent Portion	400.00		Federal Rental Assist Amount	0.00	Step 9
	Add Nev Move In	w Event - 01/06/2016	Population Served	None	~	Non-Federal Rental Assist Amount	0.00	
Bomindor: Topon	t roopiuing		Is Disabled			Rental Assist Type	N/A 💊	•
Remnuer. Terran	it receiving		HH Member Count	1		Rental Assist Source	N/A 💊	•
subsidy that is Pr	oject-		All Student House	No 🗸		Student Count	0	
based enter the	enant Rent						L	
Portion as the To	tal Tenant			MILIHIC				
Payment			Funding Program	Шноме		Student Explanation	N/A	~

#### Step 7: Choose Rent and Income Level % from the dropdown boxes

- 30% is the default rent and income level for Add New Events
- If you have a different Rent Level than what is listed, list it in the Notes box and choose the closest corresponding Rent Level %

i.e. If you have a 42% rent limit, you would add to the notes: "42% Rent Limit \$\_\_\_\_\_ (the amount)", under the Rent Level % dropdown box you would choose 50% because it is the next greatest rent level %

• They appear based on the funding source in DevCo, e.g. HTC, HOME

Income:	
---------	--

MTSP	HERA Special	HOME
18%	18%	
30%	30%	
35%	35%	
50%	50%	50%
60%	60%	
80%		

#### Rent:

MTSP	HERA Special	НОМЕ
18%	18%	Low Rent- 50%
30%	30%	High Rent- 65%
35%	35%	
50%	50%	
60%	60%	
80%		

Note: For more information on HERA Special and the rent & income limits please see the current Income and Rent Limit Implementation Memo (http://www.ohiohome.org/compliance/incomelimits.aspx)

#### Step 8: Add Tenant Rent Portion

- If the tenant is receiving subsidy in the form of a Housing Choice Voucher, enter their portion of the rent as calculated by the local Public Housing Authority (PHA).
- If the tenant is receiving subsidy that is project-based through either the local PHA or from HUD, then enter the amount listed as the Tenant Rent (TR) as indicated on their 50058 or 50059. If due to low Tenant Payment (TTP) and a high Utility Allowance (UA), the resident is a negative renter that gets Utility Reimbursement check, please use \$0 for the rent and list the correct UA for the unit.

#### Step 9: Add Rental Assistance Amount, Type and Source

- Types: Property Based or Tenant Based
- Sources: Rural, Section 8 Project Based, HOME, Other, TC, Section 8 Tenant Based
- If no assistance, mark zero for the amount and N/A for the type of source

#### Step 10: Enter: HH Member Count

#### Step 11: Select: Funding Program

- Note: if funding programs are not selected, the compliance checks in DevCo will not function properly.
- If a property has Housing Tax Credits (LIHTC) it must be checked on every unit
- For other funding types they should be checked based on what OHFA programs the household is qualifying for





• All funding types that the household is qualifying for should be selected

#### Step 12: As applicable; enter: Special Needs Code, Is Disabled, and student household fields

#### Step 13: Select: Add Member

- Enter Household member information
- · Student Status needs to be entered
- Gender must be filled, if unknown select N/A
- Race, Ethnicity, and Special Needs must be filled in if that information has been disclosed. If undisclosed, do not assume.
- "Hispanic or Latino" and "is Disabled" check boxes <u>must</u> be filled in if that information has been disclosed. If undisclosed, <u>do</u> <u>not assume</u>.
- When entering unborn children all fields must be completed for the social security number, all zeroes can be used and the birth date must be entered with a current or previous date. Both fields can be updated once the information is known.
- Skip Current Income this will automatically populate from income calculation

#### Step 14: Select: Add Non-Asset Income

Use the dropdown to select the tenant(s) for which you are adding income and enter information

#### Step 15: Select: Add Asset Income

· Use the dropdown to select the tenant(s) for which you are adding income and enter information

#### Step 16: Select: Calculate Total Household Income and Member Income

• Once you select Calculate Total Household and Member Income, the total income will automatically populate to the Total Household Income (at top) and Household Member Current Income (by household member) fields

#### Step 17: Select: Update







#### Step 18: Must manually enter Household Income at Move-in



Note: Skip this step when completing a **Recertification**. The field will be greyed out and can not be edited at that time.

#### Step 19: Select: Update

### B. Compliance Checks - Errors and Warning

#### Step 20: Correct any errors and warnings that might have occurred

Same errors/warnings that are linked to the Properties Details Screen in **Section VII.** 

- Errors Will not let you finalize your project at the end of the year; reflects mostly items not entered
- · Warnings Will let you finalize; reflects items that may be an issue

#### **Categories of Errors and Warnings**

#### **Building**

#### - Error

Building Does Not Have A County Selected

#### **Dates**

#### - Error

- Event Date is Not in Selected Certification Year
- Initial Move-In Date is Required
- Event Date is Required

#### **Event Type**

#### - Error

- Event Type is Required
- Event Type is Transfer and No Building is Selected
- Event Type is Transfer and No Unit is Selected

#### **Funding Program**

- Error
  - Funding Program Required When Unit is not Market Rate

#### Income

#### - Error

- Total Household Income is Required
- Household Income at Move-in is Required
- Income Level is Required
- All Members Must have An Income Entered
- Income Level is Not Valid for the Funding Program
- Household Members Income Exceeds Household
- Income (e.g. user forgot to select calculate)
   Income Less Than Member Income Total

#### Warning

- $\circ$   $\;$  Total Household Income is Zero
- Income Exceeds County AMI Income Schedule
- Income Exceeds 140%

#### <u>Rent</u>

- Errors
   Rent Level is Required
  - Tenant Rent Portion is Required
  - Rent Level is Not Valid for the Funding Program
  - Allowable Rent Exceeded
- Warnings
  - Tenant Rent Portion is Zero

#### **Rental Assistance**

- Errors
  - Rental Assistance Amount is Required
  - Rental Assistance Source is Required
  - Rental Assistance Type is Required
  - Rental Assistance Type is Required when Amount is Greater than Zero

#### <u>Student</u>

- Errors
  - Student Count is Required
  - Student Household Status is Not Indicated
  - Student Explanation is Required
  - All Student Household, Student Explanation is Required
  - Students Listed Exceeds Student Count





#### **Tenant Information**

- Errors
  - Member With Special Needs, Household Needs Not Selected
  - Special Needs is Required
  - HH Member Count Must be Greater than 0
  - Head of Household Required With Last Name
  - There can Only be One Head of Household
  - There can Only be One Adult Co-Tenant
  - Household Members Listed Exceeds Member Count
  - All Members Must Have Relationship to Head of Household Entered
  - All Members Must Have a Last Name Entered
  - Household Special Needs Selected, Member with Special Needs Not Selected
  - Household Count Does Not Match Member Count

#### **Utility Allowance**

- Errors
  - Utility Allowance is Required
  - Utility Allowance Not Selected
- Warnings
  - A More Current Utility Allowance is Available -Utility Allowance is Zero (e.g. user did not enter a current utility allowance in the data base.)
  - Allowance Amount is Not Equal to the Selected Utility Allowance

#### Step 21: Re-Select: Update after making the corrections

\*\*\* Notice it now lists the TIC in the Side Panel with Event Type and Effective Date







### C. Viewing & Printing the Tenant Income Certification (TIC)

#### Step 22: Select: View TIC

Return to Property Listing	Event Detaile					
Manage Users	Event Details					
View Documents	Unit #	614				
TEST- Woodland Run-PC	Number of Bedrooms	Studio	Square footage	0		
OH-88-02000	Event Date	1/6/2016	Initial Move-in	1/6/2016		
■ 606	Event Type	Move In	Unit Identity	Program Unit 🗸		
± 607	Litility Allowance		Allowance Amount	0		
■ 609	Ounty Anowance	*	Allowance Anount	0		
± 610	l otal Household Income	20000.00	Household Income at Move-in	20000.00		
■ 612	Rent Level %	60%	Income Level %	60%		
± 613	Tenant Rent Portion	400.00	Federal Rental Assist Amount	0.00		
Add New Event	Population Served	None 🗸	Non-Federal Rental Assist	0.00		
Move In - 01/06/2016	le Disabled		Rental Assist Type	N/A N		
				N/A *		
	HH Member Count	1	Rental Assist Source	N/A 🗸		
	All Student House	No 🗸	Student Count	0		
		✓ LIHTC				
		Пноме				
	Funding Program		Student Explanation	N/A V		
		Financial Adjustment				
			Notes		1	
				^		
				~		
					]	
	Add Mombor					
	Add Weinber					
		HOU	SEHOLD MEMBERS			
	First Name Student Status	Last Name Relationship Rac	SSN Birth	Date Current Income		
	Joe Brown	***-**-000	12/23/1975	20000.00		
	Non-Student V Head of Head	ousehold 🗸 A - Asian	✓ None	V Male V	Delete	
		🗌 Hispa	nic Or Latino 🛛 Is Disabled			
	Add Non Asset Income	Inputting this information is OPTIO	IAL Information must be input if w	want to consiste a TIC		
	Add Non-Asset Income	inputting this mornation is OF nor	IAL. Information must be input if yo	u want to generate a 116.		
			INCOME C	THER THAN ASSETS		
	Member	Employment or Wages Social Se	ecurity / SSI Pensions	Public Assistance C	hild Support Other Income	Income other than Assets
	Joe Brown 🗸	11000.00 0.00	0.00	0.00 0.00	0.00	Delete
	Totals:	\$11000.00 \$0.00	\$0.00	\$0.00 \$0.00	\$0.00	\$11000.00
	Add Asset Income Input	ting this information is OPTIONAL	nformation must he input if you wa	nt to generate a TIC		
	Add A Soci meetine mpor		normation made be input if you wa	n to generate a mo.		
			INCOME FROM ASSE	TS (USE ANNUAL AMOUNTS)		
	Member	Type of Assets Current / Imputed Ca	sh Value of Assets Annual Income fr	om Assets Total Imputed	Income from Assets if Cash Value of Assets is	s over \$5,000 Income from Assets
	Joe Brown 🗸	Checking Current v 20	0.00	Delete		
				Passbook Ra	te is 0.0600%	<b>AA AA</b>
	Totals:	\$2	00.00 \$0.00	\$0.00		\$0.00
	Calculate Total Household	Income & Member Income				
	-					
	Hee Ame	punt				
	Non-Optional Charges	0.00				
	Update				Vie	ew TIC Delete This Event

#### Step 23: View information added to the TIC

- Depending on your internet browser, you will have one of three printing options:
  - $\circ$   $\,$  Option A: A PDF version of the TIC will automatically open to print
  - Option B: Use the Export to PDF button (floppy disk icon), which will manual open a PDF to print
- The Rent and Income Limits are calculated





All move-in and recertification Tenant Income Certifications used for the Housing Tax		v C	¢ [ O	.00% 🗸		Find   Tenar	Next R	ne Ce	a rtification
Credits (LIHTC) display the max income and max rent limit amount based on the 40-60 or 20-50 set-aside selection made on the 8609s. HERA Special limit are used as peeded	Current Household 3	ove In Size: 1	Mov Proje # Be	e-In Date: 0- Ti ect Name: C drooms: S	4/08/2013 iffin Acres dba S chase Acres Test quare Footage:	Cert Salmon t Buik Add	ification Date: ding ID#: OH ress: 123 432 ntv: FR/	04/08/20 -07-11111 Meigs W: 220 ANKLIN	13 ay, Columbus, OH
if they apply to a property.			2	7	00				
			PA	RT II - HOUSE	EHOLD COMPO	SITION			
	Last Name		First Name and Middle Initial	Gender	Relation to Head of Hou	ship usehold	Date of Birth	F/T Student	Last Four digits Social Security or Alien Registration No.
	Crickett		Jimmy	Female	Head of Ho	usehold	04/16/1987	N	6789
	PART III - INCOME OTHER THAN ASSETS								
	Member	(A) Employment or Wages	(B) Social Security /SSI	(C) Pensions	(D) Public Assistance	(E) Child Support	(F) Other Income	Income	(G) other than Assets
	Crickett, Jimmy 6789	12,345.00	0.0	0.0	0.00	0.00	0.00		
<b>Option B</b> : Export to PDF	Totals	12,345.00	0.0	0.0	0.00	0.00	0.00		\$12,345.00
			PART IV - INCO	ME FROM A	SSETS (USE AI	NNUAL AM	OUNTS)		
	Member	(H) Type of Assets	(I) Current/ Imputed	(J) Cash Value of Assets	(K) Annual Income from Assets	Tota from Ass	(L) al Imputed Inco sets if (J) is ove	ome er \$5,000	(M) Income from Assets
	Totals					times cur	un rent passbook n	der \$5,000 ate of 2% = 0.00	\$0.00
		PAR	V-TOTAL AN	INUAL HOUS	SEHOLD INCOM	E FROM A	LSOURCES		
							ERANKLING	untu 1 🖬	usehold Members
	INCOME FROM A	LL SOURCES	\$12,	345.00	1		Cartification (	Date:	04/08/2013
	Add (G) a	nd (M)	26%	AMGI	<b>_</b>		Income L	.imit:	\$28,880.00
	Meets Incom	e Restriction a	t: (	30%					





	PAR	RT VI - RENT	
		Other Non-Ontional Charges:	\$0.00
Tenant Paid Rent:	\$123.00	Housing Assistance Payment	\$458.00
Utility Allowance:	\$127.00	Rent Assistance Type:	Property Based
GROSS RENT FOR UNIT:		Rent AMI%	Unit meets rent restriction at
(Tenant Paid Rent + Utility Allowance)	\$250.00	16%	60%
Maximum Rent Limit for this unit:	\$927.00		
	PART VI - S	STUDENT STATUS	
Are all occupants full time students?	No	Student Explanation:	N/A
	PART VI - DEMOG	GRAPHIC INFORMATION	
Race of Head of Household: Asian		Is there a disabled household member	er? No
Ethnicity of Head of Household: Not Hispa	nic/Latino	Was anyone in the household homele	ess at application? No
The information on this form will be used to determine	SIG e maximum income eliqi	NATURES bility. I/We have provided for each person(s) set f	orth in Part II acceptable
The information on this form will be used to determine erification of current anticipated annual income. IW ew member moving in. IWe agree to notify the land under penalties of perjury. I/we certify that the inform urther understands that providing failse representatio erimination of the lease agreement. We certify that the information in this tenant certifica- formation contained in this tenant certification form	sig e maximum income eligi ke agrete to notify the lan diord immediately upon a ation ns he icon for t prior to the certification of	INATURES billy. (We have provided for each person(s) set dird immediately upon any member of the hous any member becoming a full time student. : Using the print he first time. tion dates. Shou date, IWe agree to immediately notify manageme	orth in Part II acceptable ehold moving out of the unit or any ur knowledge. The undersigned rmation may result in the ald there be any change in any nt of the changes.
The information on this form will be used to determin erification of current anticipated annual income. IW new member moving in. IWe agree to notify the land under penahies of perjury. Iwe certify that the inform under understands that providing failse representatio ermination of the lease agreement. We certify that the information in this tenant certification formation contained in this tenant certification form IWe certify that my/our income for the period star	sign e maximum income eligi le agree to notify the lan alord immediately upon a aston option C ticon for t tion for t ting04/08/20	INATURES billy. IWe have provided for each person(s) set if diord immediately upon any member of the hous any member becoming a full time student. Using the print he first time. tion dates. Shou date, IWe agree to immediately notify management D13and ending04/08/2014	orth in Part II acceptable ehold moving out of the unit or any wr knowledge. The undersigned rmation may result in the ald there be any change in any nt of the changes. is: \$12,345.00
The information on this form will be used to determine effication of current anticipated annual income. IW ever member moving in. IWe agree to notify the land inder penalties of perjury, Iwe certify that the inform uther understands that providing failse representatio ermination of the lease agreement. We certify that the information in this tenant certification formation contained in this tenant certification form I/We certify that my/our income for the period star SIGNATURE OF LESSEE	sign e maximum income eligi le agree to notify the lan alord immediately upon a asion Doption C icon for t tion prior to the certification o rting 04/08/20 DATE	INATURES billy. IWe have provided for each person(s) set if diord immediately upon any member of the hous any member becoming a full time student. Using the print he first time. tion dates. Shou date, IWe agree to immediately notify manageme D13 and ending 04/08/2014 SIGNATURE OF LESSEE	orth in Part II acceptable ehold moving out of the unit or any wr knowledge. The undersigned rmation may result in the uld there be any change in any nt of the changes. is: \$12,345.00 DATE
The information on this form will be used to determin reinfloation of current anticipated annual income. IW new member moving in. IWe agree to notify the land inder penalties of perjury. Iwe certify that the inform unter understands that providing false representatio ermination of the lease agreement. IWe certify that the information in this tenant certifica formation contained in this tenant certification form IWe certify that my/our income for the period star SIGNATURE OF LESSEE SIGNATURE OF LESSEE	BIG a maximum income eligi a sagree to norme eligi soft of the lan ation icon for ti icon for ti prior to the certification of tring 04/08/20 DATE DATE	INATURES billy. (We have provided for each person(s) set if diord immediately upon any member of the hous any member becoming a full time student. Using the print he first time. bills in the agree to immediately notify manageme bills and ending 04/08/2014 SIGNATURE OF LESSEE SIGNATURE OF LESSEE	orth in Part II acceptable ehold moving out of the unit or any wur knowledge. The undersigned irmation may result in the ald there be any change in any the of the changes. is: \$12,345.00 DATE DATE
The information on this form will be used to determine effication of current anticipated annual income. IW ever member moving in. IWe agree to notify the land of the penalties of perjury, IWe certify that the inform ther understands that providing failse representatio ermination of the lease agreement. We certify that the information in this tenant certifica- formation contained in this tenant certification form I/We certify that my/our income for the period star SIGNATURE OF LESSEE SIGNATURE OF LESSEE ISIGNATURE OF LESSEE	BIG a maximum income eligit a sagree to notify the lan alord immediately upon a ation <b>Option C</b> icon for t icon for t ring 04/08/20 DATE DATE DATE s and documentation requi	INATURES billy. IWe have provided for each person(s) set if diord immediately upon any member of the hous any member becoming a full time student. Using the print he first time. tion dates. Shou date, IWe agree to immediately notify manageme  D13 and ending 04/08/2014 SIGNATURE OF LESSEE SIGNATURE OF LESSEE Ired to be submitted, the individual(s) named in Part II amended, and the Restrictive Covenant (if applicable	orth in Part II acceptable ehold moving out of the unit or any wir knowledge. The undersigned irmation may result in the ald there be any change in any nt of the changes. is: \$12,345.00 DATE DATE of this Tenant Income Certification ), to live in a unit in this Project.
he information on this form will be used to determine effication of current anticipated annual income. IW ew member moving in. IWe agree to notify the land inder penalties of perjury. Iwe certify that the inform ther understands that providing failse representatio ermination of the lease agreement. We certify that the information in this tenant certifica- formation contained in this tenant certification form IWe certify that my/our income for the period star SIGNATURE OF LESSEE SIGNATURE OF LESSEE ased on the representations herein and upon the proof are eligible under the provisions of Section 42 of the in SIGNATURE OF OWNER/AGENT	BIG e maximum income eligi is agrete to norme eligi ation icon for ti icon for ti prior to the certification of tring 04/08/20 DATE DATE s and documentation requi ternal Revenue Code, as	INATURES billy. (We have provided for each person(s) set if dird immediately upon any member of the hous any member becoming a full time student. : Using the print he first time. tion dates. Shou date, IWe agree to immediately notify management 013 and ending 04/08/2014 SIGNATURE OF LESSEE SIGNATURE OF LESSEE Ired to be submitted, the individual(s) named in Part II amended, and the Restrictive Covenant (If applicable	orth in Part II acceptable ehold moving out of the unit or any wur knowledge. The undersigned rmation may result in the ald there be any change in any th of the changes. is: \$12,345.00 DATE DATE In this Tenant income Certification b), to live in a unit in this Project.

#### Step 24: After Viewing the TIC

- Select: Return to Event Details
- This will take you back to "Event Details" for the selected unit.

ſ	- <u>0</u> - 0 - 0 - 0 - 0 - 0 - 0 - 0 - 0 - 0 -	Ohio Housing Finance Agency	DevCo Online Management System
		Tiffin Acres dba Salmon C	
	Return to Event Details	4 4 <b>1</b> of 1 ▷ ▷  φ	100% V Find   Next 🔍 🗘 🖨
		© <sub>©</sub> Dev Co	Tenant Income Certification





### D. Other Event Updates

Based on the type of Event selected certain fields will be grayed out and unavailable for editing.

Event Details			
Unit#	501		
Number of Bedrooms	2 Bedroom	Square footage	1300
Event Date	12/4/2014	Initial Move-in	11/5/2014
Event Type		<ul> <li>Unit Identity</li> </ul>	Program Unit
Utility Allowance	Move In	Allowance Amount	100.00
Total Household Income	Move Out	Household Income at Move-in	11000.00
Rent Level %	Recertify Transfer Out	Income Level %	60% 🔻
Tenant Rent Portion	Composition Update	Federal Rental Assist Amount	0.00
Special Needs Code	Student Update	Non-Federal Rental Assist Amount	0.00

• Move-In - move-in of household

Update Events:

- Move-Out move-out of household
- Recertify recertification of Household
- Transfer Out household is transfering to a different unit (once transferred Event in new unit will say Transfer In)
- Composition Update addition or removal of non-head of household member
- **Rent Update** tenant portion of rent has changed
- Student Update update to DevCo confirming or changing the student status
  - Note: Student Update should only be used for HTC units

The steps described in this section cover entering a Student Update in DevCo, and the steps will be similar for all the update type of events

• If a move-in event is missing, you will need to enter it from the original reporting year that the move-in occurred (See Section VII. E. Entering Historic Move-in Events)

#### Step 1: Pick the unit you want to update using the left hand panel

#### Step 2: Select: Add New Event

Step 5	Non-Student V Head of Ho	usehold V A - Asia	n V None	Male V Delete
	Student Status	Relationship Ra	ce and Ethnicity Sp	Decial Needs Gender
	Eirst Namo	HO	JSEHOLD MEMBERS	Pirth Data Current Income
	Add Member			
				Ç
			Notes	
		Financial Adjustment		
	Funding Program	Номе	Student Explanation	N/A 🗸
-	4	LIHTC		Step
Step 5	All Student House	No 🗸	Student Count	0
	HH Member Count	1	Rental Assist Source	N/A 🗸
	Is Disabled		Rental Assist Type	N/A V
	Population Served	None 🗸	Non-Federal Rental Assist	0.00
	Tenant Rent Portion	400.00	Federal Rental Assist Amou	unt 0.00
	Rent Level %	60% 🗸	Income Level %	60%
	Total Household Income	20000.00	Household Income at Move	-in 20000.00
step 4	Utility Allowance	×	Allowance Amount	0
24 a.u. 4	Event Type	Move In	✓ Unit Identity	Program Unit
Step 3	Event Date	1/6/2016	Initial Move-in	1/6/2016
	Unit #	614	0	0





#### Step 3: Add the Event Date

• Student Status needs to be updated annually for HTC

#### Step 4: Choose Student Update from the Event Type dropdown box

Once you Select the Student Update Event the last certification entered information will appear.

#### Step 5: Update the Student information if it has changed

- All Student House-Hold drop down: No/Yes
- Student Count
- Student Explanation
  - N/A
  - TANF Assistance
  - Job Training Program
  - Single Parent/Dependent Child
  - Married/ joint return
  - Former Foster Child
- Under Add Member: Student Status for each member of the household

#### Step 6: Select: Update

**Note**: You should have a signed Student Certification in the file, this Student Update from DevCo does NOT take the place of the Student Certification in the file and does not need to be printed



### E. Entering Historic Move-in Events

A Move-in Event must be entered in DevCo online before any other type of event entered for a unit

- If a move-in event is missing from the system you will need to enter it from the original reporting year that the move-in occurred
- · For DevCo, those move-ins that must be entered before the current year are considered historic move-ins

#### Step 1: To access an older reporting year, Select: Return to Property Listings

Return to Property Listing Manage Users	Event Details				
View Documents	Unit #	614			
E TEST- Woodland Run-PC	Number of Bedrooms	Studio		Square footage	0
<ul> <li>OH-88-02000</li> <li>OH-88-02001</li> </ul>	Event Date	1/6/2016		Initial Move-in	1/6/2016
■ 606 ■ 607	Event Type	Move In	~	Unit Identity	Program Unit 🗸
■ 608	Utility Allowance		$\checkmark$	Allowance Amount	0
± 609 ± 610	Total Household Income	20000.00		Household Income at Move-in	20000.00
	Rent Level %	60%	~	Income Level %	60%
■ 613	Tenant Rent Portion	400.00		Federal Rental Assist Amount	0.00
Add New Event Move In - 01/06/2016	Population Served	None	~	Non-Federal Rental Assist Amount	0.00
■ 615	Is Disabled			Rental Assist Type	N/A 🗸
	HH Member Count	1		Rental Assist Source	N/A 🗸
	All Student House	No 🗸		Student Count	0
		LIHTC			
	Funding Program			Student Explanation	N/A 🗸

#### Step 2: Select: Show All Owner Certifications (includes Historic Reporting Years)

• The list will expand to include previous reporting years.

#### Step 3: Check that the Status for the needed reporting year states Active

 If it does not say Active, contact the DevCo Helpdesk at <u>https://devco.ohiohome.org/devcoinquiries</u> to activate that year so it can be edited

#### Step 4: Select: The correct Eff Date (Reporting Year) for the property

	Request another pro My Profile	perty	Properties Listing					
	Return To Programs I	Listing	TEST - Earhart Properites (GP) 23 Test Street Cleveland OH 43215-6906 Show All Reporting lears. Filter to one address first. Properties Assigned to you:		614-466-4385 first.			
			Property Name 🛛 🖓	Reporting Year	Status 🗸	Award Number	Num Buildings	Num 👚
Note: "Show All Repo	Note: "Show All Reporting		TEST- Lindbergh Estates-PC	2015	Monitoring	079900	3	14
Years" is graved out until filter for			TEST- Lindbergh Estates-PC	2016	Active	079900	3	14
Property Name is use	d.		TEST- Merging Projects-PC	2015	Active	N-B-94-9999, N-B-12-9999, 129999	6	26

#### Step 5: Select: The unit for which you are adding the historic move-in

- From this previous year, complete steps for adding a move-in event (See Section VII. A. Event Details-Manually Adding TICs)
- If the event details are all grayed out, contact the DevCo Helpdesk at <u>https://devco.ohiohome.org/devcoinquiries</u> to activate that year
- · Once finished, you will need to return to the current reporting year to completely any updates on the unit











### **VIII. FINALIZE YEAR - (SUBMIT TENANT EVENTS)**

Once you have all of your tenant, unit and building certification information loaded, you are ready to finalize for that certification year **Note**: Finalize Year function should only be done at the end of the reporting year

- After you finalize your tenant events, you CANNOT go back and change any information from that year
- If a change is necessary contact the DevCo Helpdesk at https://devco.ohiohome.org/devcoinquiries for this project

#### Step 1: Review your report of Tenant Events; Select: Export Events from the Property Details Screen

- Double check if all the events for the reporting year are listed
- If a unit is not listed, this means there is not a tenant event recorded in DevCo for that reporting year and will need to be entered
- · Tenant events must be added chronologically

Return to Property Listing Manage Users View Documents TEST- Salmon Chase Acres II-PC GOH-07-11112 OH-07-11114 OH-07-11114 OH-07-11114	Property Details There are 35 issues for this property TEST- Salmon Chase Acres II-PC DBA: Tiffin Acres (test) 123 Kirker Way_TESTINGTHIS Lancaster OH, 43130	y. Click to display.	Compliance Scattered Si	Analyst: Miche te: No	elle Carroll	Utility Allowances Import Events Export Events Finalize Year
■ OH-07-11116	Program	Award Number	Award Date	Buildings	Units	Annual Certification
	HDAP-LIHTC(HOME)	N-B-07-1111	1/1/2012	5	4	8 Remove Property
	LIHTC - Competitive	079999	5/28/2007	0	1	0
	TCE-1602	TCE-07-9999	12/21/2015	0		0

- To transfer data to a spreadsheet select Export Events at bottom of Export Events screen
  - This will open a file in Excel that can easily be reviewed and filtered

N Bui	ildingName	UnitName	UnitBedroomNumber	UnitSquareFeet	FundingType	EventTypeCode	EventDate	InitialMoveInDate	RentLevel
OH	1-88-02000	501	2	1300	TC	MI	03/05/2013	03/05/2013	60%
OH	1-88-02000	502	2	1300	TC	MI	06/20/2013	06/20/2013	60%
OH	1-88-02000	502	2	1300	TC	MI	12/16/2013	12/16/2013	60%
OH	1-88-02000	502	2	1300	TC	MO	12/11/2013	06/20/2013	60%
OH	1-88-02000	503	1	750	TC	MI	03/15/2013	03/15/2013	60%
OH	1-88-02000	503	1	750	TC	SU	09/20/2013	03/15/2013	60%
OH	I-88-02001	604	2	500	TC	MI	02/23/2013	02/23/2013	60%
OH	I-88-02001	605	1	750	TC	MI	08/17/2013	08/17/2013	35%

Step 2: Select: Return to Property Details





#### Step 3: Resolve issues listed

- You may either have errors or warnings listed
- You CANNOT proceed without resolving the errors
- In this example, only Warnings appear therefore, we can proceed to Finalize.
  - Errors must be corrected for Finalize Year to work

(See Section VII B. Compliance Checks – Errors and Warnings for more information)

Finalize Er	rors			
Building	Unit	Description	Severity	Event
OH-88-02000	502	Income Exceeds County AMI Income Schedule	Warning	Move In - 12/16/2013
OH-88-02000	502	Income Exceeds 140% Rule	Warning	Move In - 12/16/2013
Proceed to Fina	alize			

#### Step 4: Select: Finalize Year

• When clicking Finalize Year the status will switch to Property Review

Return to Property Listing Manage Users Vew Documents TETEST- Salmon Chase Acres II-PC CH-07-11112 CH-07-11113 CH-07-11114 CH-07-11114	Property Details There are 35 issues for this property TEST- Salmon Chase Acres II-PC DBA: Tiffin Acres (test) 123 Kirker Way_TESTINGTHIS Lancaster OH, 43130	. Click to display.	Compliance Scattered Sit	Analyst: Michei ie: No	lle Carroll	Utility Allowances Import Events Export Events Finalize Year
I OH-07-11116	Program	Award Number	Award Date	Buildings	Units	Annual Certification
	HDAP-LIHTC(HOME)	N-B-07-1111	1/1/2012	5	4	8 Remove Property
	LIHTC - Competitive	079999	5/28/2007	0	1	0
	TCE-1602	TCE-07-9999	12/21/2015	0		0

#### Step 5: Select: Start Finalization

Return to Property Detail	Start Finalization Process
	This will start the finalization process for your annual owner certification. This process will allow you to review any basic compliance issues that have been identified. If there are any issues, you will be allowed to make modifications which will be recorded for the submission. After reviewing the certification, you will be able to complete the finalization process. Once the certification is finalized, you will have the ability to print a receipt and you will no longer be able to edit this certification.
	Start Finalization





#### Step 6: Review remaining issues listed

- You may either have errors or warnings listed
- You CANNOT proceed without resolving the errors
- In this example, only Warnings appear therefore, we can proceed to Finalize.
  - Errors must be corrected for Finalize Year to work

(See Section VII B. Compliance Checks – Errors and Warnings for more information)

Finalize Er	rors			
Refresh Error L	ist			
Building	Unit	Description	Severity	Event
OH-88-02000	502	Income Exceeds County AMI Income Schedule	Warning	Move In - 12/16/2013
OH-88-02000	502	Income Exceeds 140% Rule	Warning	Move In - 12/16/2013
Proceed to Fina	alize			

#### Step 7: After you resolve the errors, you will have to go back through the Finalize Year process:

#### Step 8: Select: Refresh Error List

• The Warnings will be listed; these will not hinder the project being finalized

#### Step 9: Select: Proceed to Finalize

#### Step 10: Select: Finalize

#### Step 11: A Receipt for the tenant events submission will be ready for you to Print

• This should be kept as a record of when tenant data was submitted intially, if the property is made active after the Deadline this impacts the submission date when the property is re-finalized



#### Step 12: Select: Return to Property Details

• Note: After the tenant events for the reporting year have been finalized the buttons will change; instead of Finalize Year there is a Receipt button

Return to Property Listing Manage Users	Property Details There are 35 issues for this property	y. Click to display.					
View Documents TEST- Salmon Chase Acres II-PC OH-07-11112 OH-07-11114 OH-07-11114 OH-07-11114	TEST- Salmon Chase Acres II-PC DBA: Tiffin Acres (test) 123 Kirker Way_TESTINGTHIS Lancaster OH, 43130		Compliance Scattered Sit	Analyst: Miche te: No	lle Carroll	Utility Allowances Import Events Export Events Receipt	
■ OH-07-11116	Program	Award Number	Award Date	Buildings	Units	Annual Certification	
	HDAP-LIHTC(HOME)	N-B-07-1111	1/1/2012	5	48	Remove Property	
	LIHTC - Competitive	079999	5/28/2007	0	10		
	TCE-1602	TCE-07-9999	12/21/2015	0	0		

Step 13: You can view your Report by Selecting: Export Events from the Property Details Screen





#### Step 14: For your records you may want to Export Events which puts the information in an Excel Spreadsheet

- If a unit is not listed this means there is not a tenant event in DevCo for that reporting year and it should have been entered
- Note: to print the report of events from DevCo, it is best to export and print from Excel by clicking on Export Events at the bottom of the screen

BIN	BuildingName	UnitName	UnitBedroomNumber	UnitSquareFeet	FundingType	EventTypeCode	EventDate	InitialMoveInDate	RentLevel
	OH-88-02000	501	2	1300	TC	MI	03/05/2013	03/05/2013	60%
	OH-88-02000	502	2	1300	TC	MI	06/20/2013	06/20/2013	60%
	OH-88-02000	502	2	1300	TC	MI	12/16/2013	12/16/2013	60%
	OH-88-02000	502	2	1300	TC	MO	12/11/2013	06/20/2013	60%
	OH-88-02000	503	1	750	TC	MI	03/15/2013	03/15/2013	60%
	OH-88-02000	503	1	750	TC	SU	09/20/2013	03/15/2013	60%
	OH-88-02001	604	2	500	TC	MI	02/23/2013	02/23/2013	60%
	OH-88-02001	605	1	750	TC	MI	08/17/2013	08/17/2013	35%

#### Step 15: Notice now in the Properties Listing the Status changes from Active to Finalized

- Once the property is finalized, the OHFA Program Compliance Analyst will receive an email stating the Property Name and who finalized it. The email is dated the day the Finalization occurred.
- · Status: A property can be in one of six status stages:
  - $\circ$   $% \label{eq:constraint}$  Active The property is open for the certification year
  - Property Review The property is in the finalization process and is partially locked (contact DevCo Helpdesk to unlock)
  - **Finalized** The property has been finalized for OHFA review. Editing is no longer possible for tenant events in that reporting year.
  - Monitoring OHFA reviews the property before completion
  - **Resolution** OHFA reviews the property before completion
  - **Completed** Finalization of the property has been approved by OHFA and property has been closed for that certification year

Properties Listing						
Earhart Properties (test) 23 Test St Cleveland OH 43215-6906 Show All Owner Certificates Properties Assigned to you:	e	14-466-4385				
Property Name 🛛	Eff Date	Status 🗸	Award Number	Num Buildings	Num Units	*
Forest G. Run (TEST)	2013	Completed	F-A-10-999-99, 199999	2	5	
Forest G. Run (TEST)	2014	Finalized	F-A-10-999-99, 199999	2	5	
Lindbergh Estates (Test)	2013	Completed	070050	3	13	
Lindbergh Estates (Test)	2014	Active	070050	3	13	
Salmon Chase Acres (Test)	2013	Completed	N-B-111-1, 079999	5	50	
Salmon Chase Acres (Test)	2014	Active	N-B-111-1, 079999	5	50	











# **IX. ANNUAL CERTIFICATION**

#### **Step 1:** Select the appropriate reporting year from the Property Listing screen.

e.g., 2014 reporting year select the 2014 effective date

#### Step 2: Select: Annual Certification

Return to Property Listing Manage Users	Property Details There are 2 errors for this property.	Click to display.						
F Forest G Run (TEST)	Forest G. Run (TEST) OHFA					Utility Allowances		
E OH-88-02000	57 East Main Street	57 East Main Street Import Events						
■ 501 ■ 502	Columbus OH, 43215	S	attered Site:	No		Export Events		
Move In - 12/16/2013						Receipt		
Move Out - 12/11/2013 Move In - 06/20/2013	Program	Award Number	Award Date	Buildings	Units 🤇	Annual Certification		
± 503	HDAP-LIHTC(HOME)	F-A-10-999-99	1/18/2011	0	5	Remove Property		
■ OH-88-02001	LIHTC - Competitive	199999	1/5/2011	2	5			

### Step 3: Review each section of the Property General Information Screen

#### Step 4: Answer the question for each section: e.g. Project Information is up to date

- From the drop down Choose "Yes" or "No"
  - If the information is *not* up to date then choose "No"
  - A text box, "If not, specify the project changes", will appear. Indicate the needed changes. (see example where address changed)

#### Step 5: Select: Save

• As you complete the certification, clicking on either **Save** or **Next** will capture the changes. You can return to the page at a later date. If you do not click on either of those two buttons you will lose your changes.



eturn to Property Detail	Property General In	nformation				
	Make sure you are in the correct certification year. For the 2013 Annual Certification the Project Name chosen should correspond with the Eff. Date of 2013. Review all project, unit, management, and owner information. At the bottom of each section there is a "Yes" or "No" dropdown. Yes or No must be selected in each section to proceed to the certification questions. If the information in the indicated section is incorrect, choose "No". A text box will appear. Note the necessary change(s). For example, if the owner contact has changed please put in the text box "Owner contact changed to xxxx".					
	After completing the change entries in the text boxes or if there is no change to the information, click "Save" and then "Next" at the bottom of the page.					
	* While completing the Annual C click next and leave the page b	ertification, clicking on save wil efore saving you lose the info	enable the us mation that w	ser to return to the Certifi vas just entered.	cation at a la	ter time. <b>If you do not</b>
Project Info	Project Information	Forest G. Run (TEST)	Award(s	;)	F-A-10-99	"No"- a text box will appear to add in
	Address	57 East Main Street				updates needed.
	City	Columbus	State		OH	
	Zip	43215	County		FRANKLI	N
	Project information is up to da	te: No 🔻				
	If not, specify the project changes:	testing				/
	Linit Information					ł - '
Unit Info	Total Program Units - Studio	0	Total Proc	aram Units - 1 Bedroom	2 _	
	Total Program Units - 2	0	Total Proc	aram Units - 3 Bedroom	0	Note: Qualified Unit
	Bedroom Total Program Units - 4	0	Total Prog	gram Units - 5 Bedroom	0	identified count is based
	Total Program Units - 6 Bedroom	0				See Section VI. D. Unit
	# of Income Qualified Units Unit information is up to date:	4 ▼	# of Non-	ncome Qualified Units	1	Information.
	If not, specify the unit changes:	Has 10 Units.				<i>[[</i>
Management Info	Management					
Management into	Project Manager - Entity	Spirit of St. Louis	Manageme	Manager Contact	Amelia S	mith
	Address	250 Third Avenue	North			
	City	Minneapolis		State	MN	
	Zip	55401-1641		County		
	Phone Number	(323) 481-8103		On-site Manager		
	Email Address	ohiohousinglocator	@amail.cc	Name		
			63	Phone		
				Email		<u>_</u>
					"Y	es"- tells us this is
	Management information is u	p to date: Yes	•   <		CC	prrect information
					— ar	nd you have
	0				ve	erified it.
Owner Info	Owner-		0	. Contact		
	Project Owner - Entity	Spirit of St. Louis (test) LP	Owne	er Contact	Amelia E	arhart (Test)
	Address	250 Third Avenue North	Stata		011	
		Dublin	State	<b>b</b> .	OH	
	Zip	43215	Cour	ity .		
	Phone Number Federal ID Number	(323) 481-8103	Emai	I	housingle	ocator@ohiohome.or
	Owner Information is up to date:	No 🔻				
	If not, specify the owner changes:	Email: DevCo@test.com	1			
					Step 5	Save Next Step 6





#### Step 6: Select: Next to go to the Annual Certification screen

#### Step 7: Select the applicable certification type(s) using the dropdown below

- To select more than one certification type, press and hold the Ctrl key and click each Certification type to highlight them. If more than one certification type applies to the properties they must both be selected and submitted.
  - "Gap Financing" must be submitted for projects financed with HDAP, HOME, OHTF, FAF, NSP, TCE, or TCAP.
  - "Tax Credit" must be submitted for projects financed with 9% Housing Tax Credits or 4% Housing Tax Credits with multifamily bonds.
  - "Extended Use" must be submitted for projects financed with 9% Housing Tax Credits or 4% Housing Tax Credits with multifamily bonds that are in their 15 year extended use period. If these projects have HDAP funding, GAP Financing questions need to be completed as well.

NOTE: No project can submit both a Tax Credit Annual Certification and an Extended Use Annual Certification

#### Step 8: Click: Load. The certification questions should appear

Annual Certification				
Select the applicable certification type(s) using the drop-down below. To select more than one Certification Type, press and hold the Ctrl key and click each Certification type to highlight them. If more than one certification type applies to the property, they must BOTH be selected. a. "Gap Financing" must be submitted for Projects financed with HDAP, HOME, OHTF, FAF, NSP, or TCAP.				
b. "Tax Credit" must be submitted for Projects financed with 9% Housing Tax Credits or 4% Housing Tax Credits with multifamily bonds. c. "Extended Use" must be submitted for projects financed with 9% Housing Tax Credits or 4% Housing Tax Credits with multifamily bonds that are in their 15 year extended use period. If these projects have HDAP they need to fill out those questions as well. NOTE: No project can submit both a Tax Credit Annual Certification and an Extended Use Annual Certification.				
Click Load. The certification questions should appear. Please Note: If a needed certification type is not selected, click Save for answered questions, then click on Reset and select the required certification(s). Select Load. The missing questions should appear.				
Gap Financing Tax Credit Certification Type(s): Extended Use Load Reset				
(Select All That Apply)				

#### Step 9: Fill out the questions

- Note: If a needed certification type is not selected or highlighted
  - Click Save for any answered questions, then click on Reset and select the required certification(s)
  - Select: Load. The missing questions should appear
- For questions requiring an explanation, a text box will appear to the right requiring the explanation. The user cannot move to the next page without filling in the text boxes with appropriate responses.





Please read each question carefully before an readability.	swering. The questions are similar to prior Annual Certification questions, with minor edits for			
For questions requiring an explanation, a text box will appear to the right requiring an explanation. The user cannot move to the next page without filling in the text boxes with appropriate responses.				
Upon completing the Certification, click on nex	t. The Submit Annual Certification screen will appear.			
<ol> <li>Has there been a change in the owner or management during the reporting period? If "ves" complete Form PC-E39 "Owner-Manager Change Notification Form" located on the OHFA website.</li> </ol>	Yes			
Please Note: Mark "Yes" only if there is an organization change. Any personnel changes should be marked on the previous page under the updates.				
2. # of Income Qualified Units				
Please Note: Housing Tax Credit or Housing Tax Credit with Gap Financing properties should mark the number of Low-Income Units. Gap Financing ONLY properties should mark the number of Assisted Units.	13			
3. The Project has met the following requirements: Answer sub questions both 1 and 2, or 3 only.				
3.1. The 20-50 test under Section 42(g)(1)(A) or the 40-60 test under Section 42 (g)(1)(B), whichever minimum set-aside test was applicable to the project	Yes v			
3.2. The 15-40 test under Section 42(g)(4) and 142 (d)(4)(B) for "deep rent skewed" projects	No •			
3.3. Project does not meet any of the above tests.	No			
4. The applicable fraction as defined in Section 42 (c) (1) (B) did not change in any building in the project. If there was a change, list the applicable fraction reported to the IRS for each building for the reporting year and describe reason(s) for the change.	There was not a change ▼			
5. The owner has received an annual income certification from each low-income tenant, and doc umentation to support that certification; or, in the case of a tenant receiving Section 8 housing				
assistance payments, the statement from a public housing authority described in paragraph (b)(1)(vii) of the Recordkeeping and Retention provisions of IRS Regulation 1.42-5.	No   Explanation			
Please Note: If you are utilizing the recertification waiver from the Housing & Economic Recovery Act (HR 3221) answer yes.				

#### Step 10: Select: Save

• As you complete the certification, clicking on either **Save** or **Next** will capture the changes. You can return to the page at a later date. If you do not click on either of those two buttons you will lose your changes.

#### Step 11: Select: Next to go to the Annual Certification screen

#### Step 12: Fill out your credentials

- This information will serve as an electronic signature confirming the Certification is submitted by a person with authority to act on behalf of the owner
  - Name
  - Title
  - Company
  - Email Address
  - Direct Telephone Number





Return to Property Detail	Cubasit Assured Contification					
	Submit Annual Certification					
	The Owner certifies this project is otherwise in compliance with the Code, including any Treasury Regulations, and all other applicable laws, rules, and regulations. I understand that any false statement on the Certification or any attached materials may subject me to crin prosecution. The undersigned hereby represents, certifies and warrants to Ohio Housing Finance Agency that the undersigned is an authorized agent and signatory of the entity that is providing this Certification, and said entity is active and in good standing under the of the State of Ohio, and any and all indexing the providing this Certification, and active the date hered and the used by the of the State of Ohio.					
	undersigned solely for the purposes herein.	wided herein is the and accurate as of the date hereof, and shall be used by the				
	-					
	lest	Name				
	Devco	Title				
	modifying	Company				
	rd@devco	Email Address				
	330-123-4567	Direct Telephone Number				
	Completing the Name, Title, Company, Email Addi the Certification is being submitted by a person will example building code violations, via e-mail to <u>dev</u> project name, OHFA tracking number (project num completing the Certification, a message will appea	ress, and Direct Telephone Number fields serves as an electronic signature confirming h authority to act on behalf of the owner. Stubmit any required additional documents, for <u>vcnbelogohiohome.org</u> as an attachment. In the subject line of the email, include the ber), and AOC attachments (e.g. Tiffin Acres 079899 AOC attachments). Upon r fo remind the user what documents they need to submit.				
	The 2014 utility allowances for each project must also be entered. You will need add Utility Allowances from the Property Details screen, follow the DevCo Online Management System Guide for complete steps.					
	Submit Tenant Events for the 2014 Certification year. Tenant events should be entered by importing into DevCo through an XML upload (from HTC compliance software) or hand entering the events into DevCo. OHFA staff will provide additional assistance to work through the process of adding tenant events in DevCo.					
	The 2014 Owner Certification, Tenant Events, and project Utility Allowance update must be completed by April 3rd, 2015. For further assistance view the DevCo Online Management System Guide or contact <u>devcohelp@ohiohome.org</u> .					
	To return to a previous screen, click "Return to Property Details," click on Annual Certification, and navigate to the correct page and follow the steps at the top of each screen. Provided answers were saved, re-entering information should not be necessary. The Certification cannot be modified once submitted. If a Certification is submitted in error, contact OHFA for assistance via email at devcohelo@ohiohome.org.					
		Submit Close				

#### Step 13: Select: Submit

- If you need to send additional information, a reminder appears depending how you answered the certification questions:
  - Owner-Manager change Notification
  - Letter of findings or discrimination from the adjudicating agency or court
  - Copy of the building code or health/safety citation

	*Fill out and email the Owner-Manager Change Notification found on the OHFA website. *Email a copy of the letter of finding(s) of discrimination from the adjudicating agency or court. *Email a copy of the building code or health/safety citation. Your certification was submitted on 12/30/2014 12:31:46 PM
	ОК

#### Step 14: Select: Print for your Records

- Clicking Print provides a summary of the three pages included in the Annual Certification
  - Note: If you have returned to Annual Certification to print make sure you select all applicable certification types on the Annual Certification screen, otherwise you will have an incomplete set of questions.





#### Step 15: Select: Close

- This will take you back to Property Details
- Once you submit your Certification, you cannot make changes.
- If you return to the Annual Certification screens a red time stamp will appear on all screens
  - The message indicates that your Certification was submitted successfully
  - Date and Time of submission is recorded
  - Anything you update after submission will not be saved
  - If a correction is needed contact the DevCo Helpdesk at https://devco.ohiohome.org/devcoinquiries
    - In the form:
      - ► Give the project number
      - Project Name
      - Explain why corrections are needed

	Submit Annual Certification		go back to Annual Certification after submitting it.			
	Changes will not be saved. This was submitted on 9/25/2015 2:46:41 PM					
	The Owner certifies this project is otherwise in compliance with the Code, including any Treasury Regulations, and all other applicable laws, rules, and regulations. I understand that any false statement on the Certification or any attached materials may subject me to criminal prosecution. The undersigned hereby represents, certifies and warrants to Ohio Housing Finance Agency that the undersigned is an authorized agent and signatory of the entity that is providing this Certification, and said entity is active and in good standing under the laws of the State of Ohio, and any and all information provided herein is true and accurate as of the date hereof, and shall be used by the undersigned solely for the purposes herein.					
	test	Name				
	Title Title		tle			
	test	Company				
	test@test.com	Er	mail Address			
	123-123-1234	Di	irect Telephone Number			
	Completing the Name, Title, Company, Email Address, and Direct Telephone Number fields serves as an electronic signature confirming the Certification is being submitted by a person with authority to act on behalf of the owner. Submit any required additional documents, for example building code violations, via e-mail to <u>devcohelp@ohiohome.org</u> as an attachment. In the subject line of the email, include the project name, OHFA tracking number (project number), and AOC attachments (e.g. Tiffin Acres 079999 AOC attachments). Upon completing the Certification, a message will appear to remind the user what documents they need to submit.					
	The 2014 utility allowances for each project must also be entered. You will need add Utility Allowances from the Property Details screen, follow the DevCo Online Management System Guide for complete steps.					
	Submit Tenant Events for the 2014 Certification year. Tenant events should be entered by importing into DevCo through an XML upload (from HTC compliance software) or hand entering the events into DevCo. OHFA staff will provide additional assistance to work through the process of adding tenant events in DevCo.					
	The 2014 Owner Certification, Tenant Events, and project Utility Allowance update must be completed by April 3rd, 2015. For further assistance view the DevCo Online Management System Guide or contact <u>devcohelp@ohiohome.org</u> .					
Additional documents required will appear after the submission is complete.	To return to a previous screen, click "Return to Property Details," click on Annual Certification, and navigate to the correct page and follow the steps at the top of each screen. Provided answers were saved, re-entering information should not be necessary.					
	The Certification cannot be modified once submitted. If a Certification is submitted in error, contact OHFA for assistance via email at <a href="mailto:devcohelp@ohiohome.org">devcohelp@ohiohome.org</a> .					
	*Fill out and email the Owner-Manager Change Notification found on the OHFA website. *Email a copy of the Violation Report and any documentation of correction.					
			Print Clo	se		





Red timestamp will appear when you





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The Ohio Housing Finance Agency is an Equal Opportunity Housing entity. Loans are available on a fair and equal basis regardless of race, color, religion, sex, familial status, national origin, military status, disability or ancestry. Please visit www.ohiohome.org for more information.

