PHFA On-Line Compliance System Manual

DO NOT USE THE BACK ARROW AT ANY TIME ON THIS WEBSITE.

LOG IN

www.phfa.org / log in / multifamily log in

Should see Welcome screen / Bulletin Board of any current announcements.

Menu Options

Sign In

- Owner ID (only use number)
- User Name (case sensitive)
- Password (*first time - Password1)
- (*new password must be at least 6-10 characters and contain at least one capital letter and/or one number and are also case sensitive)
- Click on Save Password.

Contact

- Shows contacts for website problems, tax credit compliance staff and Sr. Management Reps for PennHOMES properties.

Owners Certificate

- Select Property
- Enter Compliance Year
- Click on Display Owner Certification
- Complete form
- Click Print Owner Certification
- Click Save Owner Certification
- Click Return to Owner Certification Selection
- ******Owners must sign hard copy of Certification******
- Click Edit
- Click box to indicate a signed copy is on file
- Click Submit Owner Certification to PHFA
- Cannot be submitted before January 1st of the following calendar year

****New submission due date for all properties is January 31st of the following calendar year****

Rental Schedule

- Select Property
- Enter compliance year
- Click Display Rental Schedule
  - Automatically populates from TIC entries.
  - Any corrections that need to be made on the rental schedule need to be revised on the appropriate TIC.
- Click Print Rental Schedule
- Click Submit Rental Schedule to PHFA

RENTAL SCHEDULES CANNOT BE SUBMITTED OR PRINTED BEFORE JANUARY 1st OF THE FOLLOWING CALENDAR YEAR.

TIC Entry

Select Property
Select Building
Select Unit (+ sign changes unit #)
This shows Property Name
TC# / BIN # / Building # / Address / Unit # / BR size
Last Tenant Income Certification
Current tenant is displayed

Tenant Income Certification History
Click display to view previously saved or submitted TIC
Click revise to change previously submitted TIC

Create New Tenant Income Certification

MUST SELECT CERTIFICATION TYPE (click on v button for drop down)

Move-In
Cannot process a move-in to an occupied unit; process vacancy first.

Safe Harbor
Rev. Proc. 2003-82 allows for a January 1 test (certification) of income at the beginning of the deferred credit period.

Waiver Certification
Only requires Update Household Composition, Student Status and Unit rent information.

Annual Recertification
Can only be processed using exact date of move-in or first day of same month as move-in.

Interim
Can be used to add new household member.

Vacancy
Must process a vacancy before a move-in.

Transfer-Different Building
Only allowed if election was made on IRS Form 8609 Line 8b was checked yes.

Transfer - Same Building
Self Explanatory.

Click Unit Type (Low Income / Market Rate)

Enter Effective Date (MMDDYYYY)

Date of Move-In = any date reflective of tenant occupancy.
EXCEPTION - Existing tenants at time of acquisition would use the acquisition placed - in - service date.

Date of Safe Harbor = January 1st.

Date of Waiver Certification = first of month of anniversary of move-in.

Date of Annual Recertification = either first of month or actual date of month of anniversary of move-in.

Date of Interim Certification = first of any month.

Date of Vacancy = any date reflective of tenant move-out.

Date of Transfer = any date reflective of a household move from one building to another

Requested Tenant Income Certification will display

Certification Type
Effective Date
Move-In Date

<u>Part I Development Data</u>
** Make sure accessibility questions are correct
Click Yes or No for manager unit

<u>Part II Household Composition</u>
If Social Security Number is blank, a Race and Ethnicity Form will automatically appear.
Click add new row to add an new household member
(Hyphens must be used when entering Social Security Number)

<u>Part III Gross Annual Income</u>
Click add new row button to add household member
Click recalculate button to compute new subtotals

<u>Part IV Income from Assets</u>
Click add new row button to add household member
Click recalculate button to compute new subtotals

<u>Part V Determination of Income & Eligibility</u>
*Automatically populates
*Information shown is for Tax Credit purposes only

<u>Part VI Rent</u>
Enter correct Rent and click Recalculate

<u>Part VII Student Status</u>
Automatically populates from Household Composition Status box above.

<u>Part VIII Program Type</u>
Automatically populates from info received when property applied for credits

<u>Signature of Owner</u>
Click box when owner's signature has been obtained

Click Print Tenant Income Certification Form

Click Save

******You may want to save before submitting because the system will find any obvious errors. If you select save, go back and click on edit, make any necessary changes, then click submit.

****** PHFA encourages you to submit TICs as they occur throughout the year.

TIC Import

Click on Instructions
Tax Credit Numbers, BINs and unit numbers / ALL MUST MATCH CORRECTLY IN ORDER FOR UPLOADS TO SUCCESSFULLY IMPORT WITHOUT ERROR

Create XML file from your software vendors program and save to an easily accessible folder on your computer

Click on TIC Import

Click on Search

Locate created XML file

Click to select file
(path to file must appear in white space to the left of search)

Click on Submit Tenant Income Certifications to PHFA via Vendor File

XML SCHEMA VALIDATION
Succeeded or Failed

XML Data Validation
Records Failed
Records Passed

Upload Results
Records Rejected
Records Accepted

Message will appear if the file has been successfully uploaded or if there is an error on any of the files.

If you choose to correct all errors at once you may simply upload again.
***Please be aware that previously submitted files that were successfully uploaded will now show as # of failures.

****Depending on error it may be better to correct a single unit error on the PHFA website and in your software program than to resubmit all the units.

<u>Edit Account / Administrative Access</u> (must be done first to assign users)

Enter email address and click on save

Click on Administrative Access available

- Click on SELECT to create a new user (First time - Password1, Group ID stays the same)
- Click on Create New Account
- Enter User Name and Name
- Click on Assigned Properties
- Click on applicable access rights

Click on Save Changes

Properties assigned to the selected user will then appear when that User's name is selected

<u>Sign Out</u> Self Explanatory

<u>Contact</u>

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