

Affordable Housing Data Guidance - CandD

Commitment & Property Collateral: Housing Goals Data and Affordability Restrictions																
ID	Multifamily Affordable Housing (MAH) Type	UW Data Form 4662 Affordable Housing Type	Commitment MAH Type	Commitment Additional Disclosure	Affordable Housing Type	Original Tax Credit (\$)	Remaining Credit Period for Tax Credits (months)	Units with Income or Rent Restrictions (%)	Percentage of Units with Rent and/or Income Restrictions at/below Specified Area Median Income	Tax Credit Percent	LIHTC Initial Compliance Period End Date	LIHTC Extended Use Period End Date	Tax Exemption or Abatement	Remaining Term of Tax Exemption/Abatement (months)	Section 8 Occupancy	HAP Remaining Term (months)
1	"NEW" LIHTC ONLY: LIHTC WITH AT LEAST 8 YEARS OF THE ORIGINAL 15 YEAR IRS COMPLIANCE PERIOD REMAINING OR "NEW" LIHTC: LIHTC WITH AT LEAST 8 YEARS OF THE ORIGINAL 15 YEAR IRS COMPLIANCE PERIOD REMAINING AND ADDITIONAL TYPES OF RESTRICTIONS	LIHTC	LIHTC	Yes, when Tax Exemption or Abatement = Yes ; Additional Disclosure Comments: Tax Exemption or Abatement	LIHTC	Required	Required	Required Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields	Required Enter the percent of Rent and/or Income Restrictions at or below 60% AMI and 50% AMI Enter the percent of Rent and/or Income Restrictions at or below 60% AMI and 50% AMI If there are multiple regulatory agreements , provide the information associated with the <u>most restrictive percent (lowest maximum AMI)</u> of the agreements Note: Restriction total not to exceed 100%	Required Only acceptable choices are "9%" or "4%"	Required	Required	Required Choices: "yes" or "no"	Required if answer to "Tax Exemption or Abatement?" was "yes"	Leave blank	Leave blank
2	LIHTC ONLY, WITH LESS THAN 8 YEARS REMAINING IN THE ORIGINAL 15 YEAR IRS COMPLIANCE PERIOD OR LIHTC – TAX CREDITS HAVE BEEN TAKEN, ORIGINAL 15 YEAR IRS COMPLIANCE PERIOD IS OVER, HOWEVER THE EXTENDED USE RESTRICTIONS REMAIN	Other	Other	Yes, when Tax Exemption or Abatement = Yes ; Additional Disclosure Comments: Tax Exemption or Abatement	Other	Required	Required when Tax Credit Period (10 yrs.) has not yet expired Leave Blank	Required Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields	Required Enter the percent of Rent and/or Income Restrictions at or below 60% AMI and 50% AMI Note: Restriction total not to exceed 100%	Required Only acceptable choices are "9%" or "4%" Leave Blank	Required	Required	Required Choices: "yes" or "no"	Required if answer to "Tax Exemption or Abatement?" was "yes"	Leave blank	Leave blank
3	PROJECT-BASED HAP (INCL. SEC 8)	PROJECT-BASED HAP (INCL. SEC 8)	PROJECT-BASED HAP (INCL. SEC 8)	Yes, when Tax Exemption or Abatement = Yes ; Additional Disclosure Comments: Tax Exemption or Abatement	Project-Based HAP (incl. Sec. 8)	Leave blank	Leave blank	Required Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields	Required Our Guide requires a minimum of 20% of Project-Based HAP units restricted at or below 80% to qualify the deal as MAH o Enter percent of units restricted to Low to Moderate Income in "At or Below 80% of Median Income" o Enter percent of units restricted to Very Low Income in "At or Below 50% of Median Income" Note: Restriction total not to exceed 100%	None	Leave Blank	Leave Blank	Required Choices: "yes" or "no"	Required if answer to "Tax Exemption or Abatement?" was "yes"	Required Percentage: calculate the number of Section 8 units in the HAP contract divided by the total number of units at the property (do not exclude any "down" units); tenant-based Section 8 vouchers are not counted	Required

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4	"NEW" LIHTC: LIHTC WITH AT LEAST 8 YEARS OF THE ORIGINAL 15 YEAR IRS COMPLIANCE PERIOD REMAINING AND PROJECT-BASED HAP (INCL. SEC 8)	Both LIHTC & Project-Based HAP (Inc. Sec 8)	Both LIHTC & Project-Based HAP (Inc. Sec 8)	Yes, when Tax Exemption or Abatement = Yes ; Additional Disclosure Comments: Tax Exemption or Abatement	Both LIHTC & Project-Based HAP	Required	Required	Required Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields	Required Enter the percent of Rent and/or Income Restrictions at 60% AMI and 50% AMI Our Guide requires a minimum of 20% of Project-Based HAP units restricted at or below 80% to qualify the deal as MAH Enter the <u>more restrictive percent (lowest maximum AMI)</u> of the LIHTC or Project-Based HAP/Sec. 8 restrictions. <u>Example:</u> If 100% of the HAP/Section 8 units are Low to Moderate Income (at or below 80%AMI) but the LIHTC restrictions cover 100% of the units at or below 60% AMI, then enter the LIHTC restrictions. Note: Restriction total not to exceed 100%	Required Only acceptable choices are "9%" or "4%"	Required	Required	Required Choices: "yes" or "no"	Required if answer to "Tax Exemption or Abatement?" was "yes"	Required Percentage: calculate the number of Section 8 units in the HAP contract divided by the total number of units at the property (do not exclude any "down" units); tenant –based Section 8 vouchers are not counted	Required
5	LIHTC WITH LESS THAN 8 YEARS REMAINING IN ORIGINAL 15 YEAR IRS COMPLIANCE PERIOD AND PROJECT-BASED HAP (INCL. SEC 8) OR PROJECT-BASED HAP (INCL. SEC 8) AND ADDITIONAL TYPES OF RESTRICTIONS	Project-Based HAP (incl. Sec 8)	Project-Based HAP (incl. Sec 8)	Yes, when Tax Exemption or Abatement = Yes ; Additional Disclosure Comments: Tax Exemption or Abatement	Project-Based HAP (incl. Sec 8)	Required	Required	Required Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields	Required Enter the percent of Rent and/or Income Restrictions at or below 60% AMI and 50% AMI Our Guide requires a minimum of 20% of Project-Based HAP units restricted at or below 80% to qualify the deal as MAH Enter the <u>more restrictive percent (lowest maximum AMI)</u> of the LIHTC or Project-Based HAP (incl. Sec. 8) or Additional restrictions Note: Restriction total not to exceed 100%	Required Only acceptable choices are "9%" or "4%"	Required	Required	Required Choices: "yes" or "no"	Required if answer to "Tax Exemption or Abatement?" was "yes"	Required Percentage: calculate the number of Section 8 units in the HAP contract divided by the total number of units at the property (do not exclude any "down" units); tenant –based Section 8 vouchers are not counted	Required
6	SPECIAL PUBLIC PURPOSE (SPP) ADHERES TO MAH GUIDELINES	Other – Special Public Purpose	Other – Special Public Purpose	Yes, when Tax Exemption or Abatement = Yes ; Additional Disclosure Comments: Tax Exemption or Abatement	Other – Special Public Purpose	Leave blank	Leave blank	Required Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields	Required Restrictions must meet or exceed 20% @ or below 80% Note: Restriction total not to exceed 100%	None	Leave Blank	Leave Blank	Required Choices: "yes" or "no"	Required if answer to "Tax Exemption or Abatement?" was "yes"	Leave blank	Leave blank
7	SPONSOR-INITIATED AFFORDABILITY (SIA)	Other – Sponsor-Initiated Affordability	Other – Sponsor-Initiated Affordability	Yes, when Tax Exemption or Abatement = Yes ; Additional Disclosure Comments: Tax Exemption or Abatement	Other – Sponsor-Initiated Affordability	Leave blank	Leave blank	Required Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields	Required Rent and income restrictions that meet or exceed 20% units at or below 80% AMI means at least 20% of all units have rent and income restrictions in place making them affordable to households earning no more than 80% of AMI. (<u>Note:</u> There could also be values in the 50% or 60% AMI fields) Note: Restriction total not to exceed 100%	None	Leave Blank	Leave Blank	Required Choices: "yes" or "no"	Required if answer to "Tax Exemption or Abatement?" was "yes"	Leave blank	Leave blank

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8	OTHER TRANSACTIONS WITH UNDERSERVED COMMUNITIES THAT MAY OR MAY NOT HAVE A LURA OR REGULATORY AGREEMENTS WITH RESTRICTIONS THAT ADHERE TO THE MAH DEFINITION NOTE: NOT LIHTC, PROJECT-BASED HAP (INCL. SEC 8), SPECIAL PUBLIC PURPOSE OR SPONSOR-INITIATED AFFORDABILITY	Other	Other	Yes, Additional Disclosure Comments: <i>Property has Master Lease</i> Yes, when Tax Exemption or Abatement = Yes ; Additional Disclosure Comments: <i>Tax Exemption or Abatement</i>	Other	Leave blank	Leave blank	Required: If LURA or Regulatory Agreements Exists. Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields Leave Blank: If no LURA or Regulatory Agreements.	Required: If LURA or Regulatory Agreement Exists. If relevant due to the other restrictions and multiple agreements, enter the <u>more restrictive percent</u> of the Units at or below 80%, 60%, and/or 50% AMI Note: Restriction total not to exceed 100% Leave Blank: If no LURA or Regulatory Agreements.	None	Leave Blank	Leave Blank	Required Choices: "yes" or "no"	Required if answer to "Tax Exemption or Abatement?" was "yes"	Leave blank	Leave blank
9	NOT MAH BUT SOME RESTRICTIONS EXIST (REFER TO E. GENERAL DELIVERY INSTRUCTIONS AND THE UNDERWRITING DATA FORM (FORM 4662) IN THE AFFORDABLE HOUSING DATA GUIDANCE JOB AID WORD DOCUMENT) Note: HAP Contracts may fall into this category if less than 20% of units are subject to a Project Based HAP/Section 8 Contract (unless a waiver is approved by the MAH Deal Team.) If a waiver is approved then ID #3, Affordable Housing Type: <i>Project-Based HAP (incl. Sec 8)</i> must be followed. In this situation the property doesn't meet any other part of the MAH definition.	Not MAH	Not MAH	Yes, when Tax Exemption or Abatement = Yes ; Additional Disclosure Comments: <i>Tax Exemption or Abatement</i>	Not MAH	Leave blank	Leave blank	Required Sum of all values in Percentages of Units with Rent and/or Income Restrictions fields	Required Enter the percent of Units above 120%, at or below 120%, 100%, 80%, 60% and/or 50% AMI Note: Restriction total not to exceed 100%	None	Leave Blank	Leave Blank	Required Choices: "yes" or "no"	Required if answer to "Tax Exemption or Abatement?" was "yes"	Leave blank unless there is a HAP contract, mark the percentage of Section 8 Occupancy	Leave blank unless Project-Based HAP "Section 8 Occupancy" applies