

# Affordable Housing Data Guidance - Acquisition Systems

Commitment & Property Collateral: Housing Goals Data and Affordability Restrictions										
ID	Scenario 1	Scenario 2	Scenario 3	Scenario 4	Scenario 5	Scenario 6	Scenario 7	Scenario 8	Scenario 9	Scenario 10
<b>Multifamily Affordable Housing (MAH) Type</b>	(1) "NEW" LIHTC ONLY: LIHTC WITH AT LEAST 8 YEARS OF THE ORIGINAL 15 YEAR IRS COMPLIANCE PERIOD REMAINING  OR  (2) "NEW" LIHTC: LIHTC WITH AT LEAST 8 YEARS OF THE ORIGINAL 15 YEAR IRS COMPLIANCE PERIOD REMAINING AND ADDITIONAL TYPES OF RESTRICTIONS	(1) LIHTC ONLY, WITH LESS THAN 8 YEARS REMAINING IN THE ORIGINAL 15 YEAR IRS COMPLIANCE PERIOD  OR  (2) LIHTC – TAX CREDITS HAVE BEEN TAKEN, ORIGINAL 15 YEAR IRS COMPLIANCE PERIOD IS OVER, HOWEVER THE EXTENDED USE RESTRICTIONS REMAIN	PROJECT-BASED HAP (INCL. SEC 8)	"NEW" LIHTC: LIHTC WITH AT LEAST 8 YEARS OF THE ORIGINAL 15 YEAR IRS COMPLIANCE PERIOD REMAINING AND PROJECT-BASED HAP (INCL. SEC 8)	(1) LIHTC WITH LESS THAN 8 YEARS REMAINING IN ORIGINAL 15 YEAR IRS COMPLIANCE PERIOD AND PROJECT-BASED HAP (INCL. SEC 8)  OR  (2) PROJECT-BASED HAP (INCL. SEC 8) AND ADDITIONAL TYPES OF RESTRICTIONS (INCL. LIHTC IN EXTENDED USE PERIOD)	OTHER – SPECIAL PUBLIC PURPOSE (SPP) ADHERES TO MAH GUIDELINES	OTHER – SPONSOR-INITIATED AFFORDABILITY (SIA)	OTHER TRANSACTIONS WITH UNDERSERVED COMMUNITIES THAT MAY OR MAY NOT HAVE A LURA OR REGULATORY AGREEMENTS WITH RESTRICTIONS THAT ADHERE TO THE MAH DEFINITION  <b>Note:</b> Not LIHTC, PROJECT-BASED HAP (INCL. SEC 8), SPECIAL PUBLIC PURPOSE or SPONSOR-INITIATED AFFORDABILITY	NOT MAH BUT SOME RESTRICTIONS EXIST (REFER TO D. GENERAL DELIVERY INSTRUCTIONS AND THE UNDERWRITING DATA FORM (FORM 4662) and E. TAX RELIEF PROGRAMS IN THE AFFORDABLE HOUSING DATA GUIDANCE JOB AID WORD DOCUMENT)  <b>Note:</b> 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.	OTHER – SPONSOR-DEDICATED WORKFORCE  <b>Note:</b> Refer to D. GENERAL DELIVERY INSTRUCTIONS and the UNDERWRITING DATA FORM (FORM 4662) in the AFFORDABLE HOUSING DATA GUIDANCE JOB AID WORD document.
<b>UW Data Form 4662 Affordable Housing Type</b>	LIHTC	OTHER	PROJECT-BASED HAP (INCL. SEC 8)	Both LIHTC & Project-Based HAP (INCL. SEC 8)	PROJECT-BASED HAP (INCL. SEC 8)	OTHER – SPECIAL PUBLIC PURPOSE	OTHER – SPONSOR-INITIATED AFFORDABILITY	OTHER	NOT MAH	OTHER – SPONSOR-DEDICATED WORKFORCE
<b>Commitment MAH Type (C&amp;D)</b>	LIHTC	OTHER	PROJECT-BASED HAP (INCL. SEC 8)	Both LIHTC & Project-Based HAP (INCL. SEC 8)	PROJECT-BASED HAP (INCL. SEC 8)	OTHER – SPECIAL PUBLIC PURPOSE	OTHER – SPONSOR-INITIATED AFFORDABILITY	OTHER	NOT MAH	OTHER – SPONSOR-DEDICATED WORKFORCE
<b>Commitment Additional Disclosure (C&amp;D)</b>	Yes, if the transaction benefits from a state or local government tax relief program.  Additional Disclosure Comments: Tax Relief Program (name the type)	Yes, if the transaction benefits from a state or local government tax relief program.  Additional Disclosure Comments: Tax Relief Program (name the type)	Yes, if the transaction benefits from a state or local government tax relief program.  Additional Disclosure Comments: Tax Relief Program (name the type)	Yes, if the transaction benefits from a state or local government tax relief program.  Additional Disclosure Comments: Tax Relief Program (name the type)	Yes, if the transaction benefits from a state or local government tax relief program.  Additional Disclosure Comments: Tax Relief Program (name the type)	Yes, if the transaction benefits from a state or local government tax relief program.  Additional Disclosure Comments: Tax Relief Program (name the type)	Yes, if the transaction benefits from a state or local government tax relief program.  Additional Disclosure Comments: Tax Relief Program (name the type)	Yes, if the transaction benefits from a state or local government tax relief program.  Additional Disclosure Comments: Property has Master Lease and/or Tax Relief Program (name the type)	Yes, if the transaction benefits from a state or local government tax relief program.  Additional Disclosure Comments: Tax Relief Program (name the type)	Yes, when Sponsor-Dedicated Workforce program uses FHFAs cost-burdened and very cost-burdened markets to identify geographies  Additional Disclosure Comments: SDW with cost-burdened and very cost burdened  Yes, if the transaction benefits from a state or local government tax relief program.  Additional Disclosure Comments: Tax Relief Program (name the type)
<b>Affordable Housing Type</b>	LIHTC	Other	Project-Based HAP (Incl. Sec. 8)	Both LIHTC & Project-Based HAP	Project-Based HAP (Incl. Sec 8)	Other – Special Public Purpose	Other – Sponsor-Initiated Affordability	Other	Not MAH	Other – Sponsor-Dedicated Workforce
<b>Original Tax Credit (\$)</b>	Required	Leave blank	Leave blank	Required	Leave blank	Leave blank	Leave blank	Leave blank	Leave blank	Leave blank
<b>Remaining Credit Period for Tax Credits (months)</b>	Required	(1) Required when Tax Credit Period (10 yrs.) has not yet expired  (2) Leave Blank	Leave blank	Required	(1) Required when Tax Credit Period (10 yrs.) has not yet expired  (2) Leave Blank	Leave blank	Leave blank	Leave blank	Leave blank	Leave blank
<b>Units with Income or Rent Restrictions (%)</b>	Required  Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields	Required  Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields	Required  Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields	Required  Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields	Required  Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields	Required  Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields	Required  Sum of the values in the Percentages of Units with Rent and/or Income Restrictions fields	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  Sum of all values in Percentages of Units with Rent and/or Income Restrictions fields	Required  Sum of all values in Percentages of Units with Rent and/or Income Restrictions fields

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<i>Percentage of Units with Rent and/or Income Restrictions at/below Specified Area Median Income</i>	<b>Required</b>  (1) Enter the percent of Rent and/or Income Restrictions at or below 60% AMI and 50% AMI  (2) Enter the percent of Rent and/or Income Restrictions at or below 60% AMI and 50% AMI  If there are <b>multiple regulatory agreements</b> , provide the information associated with the <u>most restrictive percent</u> (lowest maximum AMI) of the agreements  <b>Note:</b> Restriction total not to exceed 100%	<b>Required</b>  Enter the percent of Rent and/or Income Restrictions at or below 60% AMI and 50% AMI  <b>Note:</b> Restriction total not to exceed 100%	<b>Required</b>  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"  <b>Note:</b> Restriction total not to exceed 100%	<b>Required</b>  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  o Enter the <u>more restrictive percent</u> (lowest maximum AMI) of the LIHTC or Project-Based HAP/Sec. 8 restrictions. o <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.  <b>Note:</b> Restriction total not to exceed 100%	<b>Required</b>  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  o Enter the <u>more restrictive percent</u> (lowest maximum AMI) of the LIHTC or Project-Based HAP (incl. Sec. 8) or Additional restrictions  <b>Note:</b> Restriction total not to exceed 100%	<b>Required</b>  Restrictions must meet or exceed 20% @ or below 80%  <b>Note:</b> Restriction total not to exceed 100%	<b>Required</b>  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. ( <b>Note:</b> There could also be values in the 50% or 60% AMI fields)  <b>Note:</b> Restriction total not to exceed 100%	<b>Required: If LURA or Regulatory Agreement Exists.</b>  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  <b>Note:</b> Restriction total not to exceed 100%  <b>Leave Blank:</b> If no LURA or Regulatory Agreements.	<b>Required</b>  Enter the percent of Units above 120%, at or below 120%, 100%, 80%, 60% and/or 50% AMI  <b>Note:</b> Restriction total not to exceed 100%	<b>Required</b>  Restrictions: Rent-only restrictions in place for the entire term of the Mortgage Loan  Minimum Threshold: 20% of units held at 80% AMI (up to 120% AMI in high-cost burdened markets)  SDW with cost-burdened (100% AMI) and very cost burdened (120% AMI) requires Additional Disclosure  <b>Note:</b> Restriction total not to exceed 100%
<i>Tax Credit Percent</i>	<b>Required</b>  Only acceptable choices are "9%" or "4%"	<b>Leave Blank</b>	<b>None</b>	<b>Required</b>  Only acceptable choices are "9%" or "4%"	<b>Leave Blank</b>	<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>
<i>LIHTC Initial Compliance Period End Date</i>	<b>Required</b>	<b>Required</b>	<b>Leave Blank</b>	<b>Required</b>	<b>Required</b>	<b>Leave Blank</b>	<b>Leave Blank</b>	<b>Leave Blank</b>	<b>Leave Blank</b>	<b>Leave Blank</b>
<i>LIHTC Extended Use Period End Date</i>	<b>Required</b>	<b>Required</b>	<b>Leave Blank</b>	<b>Required</b>	<b>Required</b>	<b>Leave Blank</b>	<b>Leave Blank</b>	<b>Leave Blank</b>	<b>Leave Blank</b>	<b>Leave Blank</b>

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<b>Tax Relief? (C&amp;D)</b>	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"
<b>Tax Relief? Yes (C&amp;D)</b>	If Yes, Select one of the six allowable values	If Yes, Select one of the six allowable values	If Yes, Select one of the six allowable values	If Yes, Select one of the six allowable values	If Yes, Select one of the six allowable values	If Yes, Select one of the six allowable values	If Yes, Select one of the six allowable values	If Yes, Select one of the six allowable values	If Yes, Select one of the six allowable values	If Yes, Select one of the six allowable values
<b>Is the Tax Relief Program in effect for the duration of loan? (C&amp;D)</b>	Required when Tax Relief? Is Yes Choices: "yes" or "no" If "No", Additional Disclosure is required	Required when Tax Relief? Is Yes Choices: "yes" or "no" If "No", Additional Disclosure is required	Required when Tax Relief? Is Yes Choices: "yes" or "no" If "No", Additional Disclosure is required	Required when Tax Relief? Is Yes Choices: "yes" or "no" If "No", Additional Disclosure is required	Required when Tax Relief? Is Yes Choices: "yes" or "no" If "No", Additional Disclosure is required	Required when Tax Relief? Is Yes Choices: "yes" or "no" If "No", Additional Disclosure is required	Required when Tax Relief? Is Yes Choices: "yes" or "no" If "No", Additional Disclosure is required	Required when Tax Relief? Is Yes Choices: "yes" or "no" If "No", Additional Disclosure is required	Required when Tax Relief? Is Yes Choices: "yes" or "no" If "No", Additional Disclosure is required	Required when Tax Relief? Is Yes Choices: "yes" or "no" If "No", Additional Disclosure is required
<b>Is there conventional loan affordability associated with Tax Relief Program? (C&amp;D)</b>	Choices: "yes" or "no" (Refer to E. TAX RELIEF PROGRAMS in the AFFORDABLE HOUSING DATA GUIDANCE JOB AID WORD Document)	Choices: "yes" or "no" (Refer to E. TAX RELIEF PROGRAMS in the AFFORDABLE HOUSING DATA GUIDANCE JOB AID WORD Document)	Choices: "yes" or "no" (Refer to E. TAX RELIEF PROGRAMS in the AFFORDABLE HOUSING DATA GUIDANCE JOB AID WORD Document)	Choices: "yes" or "no" (Refer to E. TAX RELIEF PROGRAMS in the AFFORDABLE HOUSING DATA GUIDANCE JOB AID WORD Document)	Choices: "yes" or "no" (Refer to E. TAX RELIEF PROGRAMS in the AFFORDABLE HOUSING DATA GUIDANCE JOB AID WORD Document)	Choices: "yes" or "no" (Refer to E. TAX RELIEF PROGRAMS in the AFFORDABLE HOUSING DATA GUIDANCE JOB AID WORD Document)	Choices: "yes" or "no" (Refer to E. TAX RELIEF PROGRAMS in the AFFORDABLE HOUSING DATA GUIDANCE JOB AID WORD Document)	Choices: "yes" or "no" (Refer to E. TAX RELIEF PROGRAMS in the AFFORDABLE HOUSING DATA GUIDANCE JOB AID WORD Document)	Choices: "yes" or "no" (Refer to E. TAX RELIEF PROGRAMS in the AFFORDABLE HOUSING DATA GUIDANCE JOB AID WORD Document)	Choices: "yes" or "no" (Refer to E. TAX RELIEF PROGRAMS in the AFFORDABLE HOUSING DATA GUIDANCE JOB AID WORD Document)
<b>Section 8 Occupancy</b>	Leave blank	Leave blank	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); <b>tenant-based Section 8 vouchers are not counted</b>	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); <b>tenant-based Section 8 vouchers are not counted</b>	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); <b>tenant-based Section 8 vouchers are not counted</b>	Leave blank	Leave blank	Leave blank	Leave blank unless there is a HAP contract, mark the percentage of Section 8 Occupancy	Leave blank
<b>HAP Remaining Term (months)</b>	Leave blank	Leave blank	Required	Required	Required	Leave blank	Leave blank	Leave blank	Leave blank unless Project-Based HAP "Section 8 Occupancy" applies	Leave blank
<b>Units Targeted for Occupancy by Low &amp; Moderate Income Tenants (Y/N) (MSFMS)</b>	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"
<b>Tax Credit (Y/N) (MSFMS)</b>	Required Yes	Required (1) Yes  (2) No	Required No	Required Yes	Required (1) Yes  (2) No	Required No	Required No	Required No	Required No	Leave blank

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<b>Percent of Tax Credit Units (MSFMS)</b>	Required	Required	Leave blank	Required	Required (1) Yes (2) No	Required No	Required No	Required No	Required No	Leave blank
<b>Tax Credit Ten Percent below Market? (Y/N) (MSFMS)</b>	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required No	Required Choices: "yes" or "no"	Required (1) Yes (2) No	Required No	Required No	Required No	Required No	Required No
<b>MAH? (Y/N) (MSFMS)</b>	Required Yes	Required Yes	Required Yes	Required Yes	Required Yes	Required Yes	Required Yes	Required Yes	Required No	Required No
<b>Project Based Section 8 HAP Contract? (Y/N) (MSFMS)</b>	Required No	Required No	Required Yes	Required Yes	Required Yes	Required No	Required No	Required No	Required Choices: "yes" or "no"	Required No
<b>Occupancy Restriction (Y/N) (MSFMS)</b>	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"
<b>Resale Restriction? (Y/N) (MSFMS)</b>	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"