

Affordable Housing Data Guidance - MSFMS

For properties that are collateral for Bulk Deliveries, new Credit Facilities or Existing Credit Facilities with Additions and Substitutions

Collateral Tab, Property Collateral, Property & Housing Goals Link: Housing Goals Data and Affordability Restrictions Section																				
ID	Multifamily Affordable Housing (MAH) Type	UW Data Form 4662 Affordable Housing Type	Affordable Housing Type	Units Targeted for Occupancy by Low & Moderate Income Tenants (Y/N)	Units with Income or Rent Restrictions (%)	Percentage of Units with Rent and/or Income Restrictions at/below Specified Area Median Income	Tax Credit (Y/N)	Tax Credit Percent	Percent of Tax Credit Units	Tax Credit Ten Percent below Market? (Y/N)	Tax Exemption (Y/N)	Tax Abatement (Y/N)	LIHTC Initial Compliance Period End Date	LIHTC Extended Use Period End Date	MAH? (Y/N)	Project Based Section 8 HAP Contract? (Y/N)	HAP Remaining Term	Occupancy Restriction (Y/N)	Section 8 Occupancy	Resale Restriction? (Y/N)
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	Required Choices: "yes" or "no"	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 Yes	Required Only acceptable choices are "9%" or "4%"	Required	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required	Required	Required Yes	Required No	Leave blank	Required Choices: "yes" or "no"	Leave blank	Required Choices: "yes" or "no"
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	Required Choices: "yes" or "no"	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 Yes No	Required Only acceptable choices are "9%" or "4%" Leave Blank	Required	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required	Required	Required Yes	Required No	Leave blank	Required Choices: "yes" or "no"	Leave blank	Required Choices: "yes" or "no"
3	PROJECT-BASED HAP (INCL. SEC 8)	PROJECT-BASED HAP (INCL. SEC 8)	Project-Based HAP (incl. Sec. 8)	Required Choices: "yes" or "no"	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%	Required No	Leave blank	Leave blank	Required No	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Leave blank	Leave blank	Required Yes	Required Yes	Required	Required Choices: "yes" or "no"	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 Choices: "yes" or "no"

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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	Required Choices: "yes" or "no"	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 Yes	Required Only acceptable choices are "9%" or "4%"	Required Required	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Required	Required Required	Required Yes	Required Yes	Required Required	Required Required	Required Choices: "yes" or "no"	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 Choices: "yes" or "no"
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)	Required Choices: "yes" or "no"	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 Yes No	Required Only acceptable choices are "9%" or "4%" Leave Blank	Required Yes No	Required No	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Required Leave Blank	Required Leave Blank	Required Yes	Required Yes	Required Required	Required Required	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 Choices: "yes" or "no"	
6	SPECIAL PUBLIC PURPOSE: ADHERES TO MAH GUIDELINES	Other – Special Public Purpose	Other – Special Public Purpose	Required Choices: "yes" or "no"	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%	Required No	Required No	Required No	Required No	Required Choices: "yes" or "no"	Required Choices: "yes" or "no"	Leave blank	Leave blank	Required Yes	Required No	Required No	Required Choices: "yes" or "no"	Leave blank	Required Choices: "yes" or "no"	

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7	SPONSOR-INITIATED AFFORDABILITY	Other – Sponsor-Initiated Affordability	Other – Sponsor-Initiated Affordability	Required Choices: “yes” or “no”	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. (Note: There could also be values in the 50% or 60% AMI fields) Note: Restriction total not to exceed 100%	Required No	Required No	Required No	Required No	Required Choices: “yes” or “no”	Required Choices: “yes” or “no”	Leave blank	Leave blank	Required Yes	Required No	Required No	Required Choices: “yes” or “no”	Leave blank	Required Choices: “yes” or “no”
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	Required Choices: “yes” or “no”	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.	Required No	Required No	Required No	Required No	Required Choices: “yes” or “no”	Required Choices: “yes” or “no”	Leave blank	Leave blank	Required Yes	Required No	Required No	Required Choices: “yes” or “no”	Leave blank	Required Choices: “yes” or “no”
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: Project-Based HAP (incl. Sec 8) must be followed. In this situation the property doesn't meet any other part of the MAH definition.	Not MAH	Not MAH	Required Choices: “yes” or “no”	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%	Required No	Required No	Required No	Required No	Required Choices: “yes” or “no”	Required Choices: “yes” or “no”	Leave blank	Leave blank	Required No	Required Choices: “yes” or “no”	Required Choices: “yes” or “no”	Required Choices: “yes” or “no”	Leave blank unless there is a HAP contract, mark the percentage of Section 8 Occupancy	Required Choices: “yes” or “no”