

Re-Certifications: Mixes properties/or required by ownership

All properties are reporting on an annual basis. Please contact our office at 406-841-2840 and ask to speak to Bob, Rena, or Todd if you have any questions.

Due by anniversary of the move-in date

Building page

After clicking on proceed to units; select the unit and click on new tenant cert/re-cert tab.

General Tab

1. *Report Period*: The one that has been assigned to you (this only needs to be entered if you have submitted since then)
2. *SSN*: Make sure only **Last 4 digits** are entered
3. *Employment Type/Occupation*: **Only used to report Student status**. This must be entered for each household member. Only needs to be updated if it has changed. Choose one of the following:
 - a. FT student, Title IV assisted
 - b. FT student, Job Training program
 - c. FT student, Married/joint return
 - d. FT student, Single parent w/dependent
 - e. FT student, Previous foster care
 - f. Other, Not full time student
4. *Move-In Date*: Will not be able to change
5. *Initial/new cert date*: anniversary of the move in date.
6. *Unit Assistance Type*: If subsidy has changed status. If it is RD please choose Other.
7. *Owner's Designation*: **DO NOT CHANGE THIS ONE**; should always read LIHTC.
8. *HOH Special Population*: Leave blank unless status has changed.

Additional Household data:

1. Phone and email is optional.
2. *HOH Ethnicity*: No need to collect again.
3. *HOH Race*: No need to collect again.

You do not have to hit update to save the information in order to proceed to the next tab but if you do not and the browser fails for any reason, you will lose your information.

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Household Tab

(Skip this tab if there are no additional household members)

1. *Household composition*: Click on new and fill in the information as described above. After all information is entered, click update and add additional household members, including unborn children.

Income Tab

(Skip if there are no changes to household income)

1. *Household Income*: If just adjusting then click view/update. If there is any new income then click new.
2. *Member name*: Select the household member
3. *Annual income*: Update with new amount. Can either put in total amount or can use the calculate button.
4. *Verification date*: This will be the date the employer signed the verification. If it is a self-affidavit it will be the date signed by the tenant.
5. *Relation*: Leave blank
6. *Source of Income*: Select appropriate type
7. *Income Verification Source*: Select appropriate type
 - a. If a self-affidavit select not verified

Any earned income for minors need be entered under their name not the parents. (SS benefits are included in this.)

Click update after information is entered and add all other income for additional household members.

Assets Tab

(Skip if there are no changes to household income)

1. *Household Assets*: If just adjusting then click view/update. If there is any new assets click new
2. *Member Name*: Select household member
3. *Type of Asset*: Select appropriate type
4. *Asset Verification Source*: Select appropriate type
5. *Verification Date*: Date verification or under 5000 signed
6. *Relation*: Leave blank
7. *Cash Value*: update total cash value of asset
8. *Annual Asset Income*: Update Income earned on asset

Click update once all data is entered and add all other assets for additional household members.

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Unit Rent Tab

(If no change to tenant paid portion/or subsidy amount you can skip this section)

1. *Rent Change Date*: No new rent date is to be entered unless there is a scheduled rent increase.
 - a. *No Voucher*: Example: Recert completed on 1/18/13 but rent to increase on 2/1/13. 2/1/13 is the rent change date to be entered.
 - b. *Voucher change*: Rent change date is the certification or effective date on determination letter from housing provider.
2. *Tenant Paid Rent*: Monthly tenant paid portion of rent(no prorated amounts)
3. *Mandatory Charges*: Any charge that is required by the property. Inquire with your company if unsure.
4. *Rent Subsidy*: If known at time of recertification.
If falls outside the period DO NOT ENTER. If entire or portion of the household was to vacate the unit you will not be able to delete it once it has been posted.
5. *Utility Allowance*: Enter only if utilities are being paid by tenant. This amount must match what is listed on the right hand side of the box.

Print out TIC from COL and have all adults sign along with manager and place on top of previous years TIC.

***DO NOT enter any retroactive rent amounts that come from the housing provider.**

*Rent subsidy: Please keep in mind that if a tenant is receiving subsidy that the total amount of tenant paid rent may go above the TC max.

*Remember that the tenant paid portion must stay below the TC limit unless they have subsidy.

*If the tenant stops receiving the subsidy, then the rent must be dropped and cannot exceed the TC max.