

2016 PRIOR TO PLACED-IN-SERVICE CHECKLIST

A. Instructions

The 2016 Qualified Allocation Plan (“QAP”) Sections 8.9.1 and 8.9.2 list required submission times for specific documents to be provided to the Iowa Finance Authority (“IFA”). These requirements are listed below. Please note that in the year the Project’s IRS Form 8609 Application will be submitted, the latest submission date for these documents is September 1st. **The IRS Form 8609 Application may not be submitted until all required documents listed in QAP Sections 8.9.1 and 8.9.2 have been uploaded to the Prior to Placed-in-Service (“PIS) Docs Tab in the online application and approved by IFA. The only exception is listed in Section B. below. n.**

B. QAP Section 8.9.1

Prior to the Placed-in-Service Date, a copy of the following documents must be submitted on the PIS Docs Tab in the online application. Should the below listed items **1-3** not be available prior to the Placed-in-Service Date, submission shall be required no later than the IRS Form 8609 Application. Items 4 and 5 are required to be submitted prior to the Placed-in-Service Date and approved by IFA prior to submission of an IRS Form 8609 Application.

- 1) New Construction Projects with three stories or less or Projects that received points for a lower HERS rating, a copy of the final home energy rating report performed by a certified HERS rater. Unless points were received for a lower HERS rating, the Project shall receive a final HERS index of 70 or less.
- 2) Projects with four stories or more (not included in B1), documentation by an independent licensed engineer that the Project exceeds ANSI/ASHRAE/IES Standard 90.1-2010.
- 3) Projects with existing structure(s), a copy of the final energy audit by a certified energy rater that verifies the recommended energy performance measures established in the final rehabilitation work order were installed correctly.
- 4) Written correspondence acknowledging the partnership between the Owner and the Public Housing Authority (“PHA”) for ongoing notifications to the PHA of the Project’s vacancies.
- 5) Free internet connectivity specifications and fully executed contract, if applicable.

C. QAP Section 8.9.2

At least 120 days prior to the first Unit being Placed-in-Service, a copy of the following must be submitted on the PIS Docs Tab in the online application:

- 1) Affirmative Fair Housing Marketing Plan Package – 1 pdf of the following bulleted items:
 - Affirmative Fair Housing Market Plan
 - Ads and brochures (in addition to IowaHousingSearch.org)
 - Picture of property sign; or picture of draft sign design; or statement and explanation as to why the property will not have a sign.
 - Tenant Selection Plan (criteria)
 - Lease
 - Lease Addendums (including the Accessible Unit Lease addendum if language isn’t included in the lease), if any
 - Resident policies and procedures
 - Waiting list policy
- 2) Targeting Plan
 - ✓ N/A Housing for the Homeless Demonstration Set-Aside Project
- 3) Documentation the Project is registered on Iowa’s free rental housing locator at www.IowaHousingSearch.org.

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D. Prior to Placed-in-Service Docs Tab

A user name and either a “Guest” or a “Prior to Placed-in-Service” role in the online application is required to upload documents to this tab. User name requests may be submitted through the online application at <https://iowafinanceauthority.iowa.gov/secure/TAC2/Login.aspx?ReturnUrl=%2fsecure%2fTAC2%2fDefault.aspx>. If the user will only be uploading documents to this tab, indicate this on the user name request. IFA will email the requestor once approved. The application creator must grant the user access to the application. Refer to the Online Application User Guide for instructions. For questions on the online application, contact Stacy.Cunningham@iowa.gov.

To upload documents:

- Select the Prior to Placed-in-Service Doc Tab
- Upload the document by selecting the “Document Type” from the drop-down field
- Type the title of document
- Select the document for upload and upload

E. Review and Approval Process

The IFA reviewer will send an email deficiency notice, if applicable, with instructions for responding. An approval email will be sent to the OwnershipEntity. Approvals are also shown in the Prior to PIS Docs Tabs. It is important to ensure the contact emails in the online application are correct.

F. Contact Information

DOCUMENT	CONTACT NAME	CONTACT EMAIL
<ul style="list-style-type: none"> • Targeting Plan 	Terri Rosonke	Terri.Rosonke@iowa.gov
<ul style="list-style-type: none"> • Affirmative Fair Housing Marketing Plan Package • Free internet connectivity specifications and contract • Registration documentation for www.IowaHousingSearch.org 	Nancy Peterson	Nancy.Peterson@iowa.gov
<ul style="list-style-type: none"> • Public Housing Authority and Owner commitment for ongoing notifications to the PHA of vacancies 	Karen Kulisky	Karen.Kulisky@iowa.gov
<ul style="list-style-type: none"> • Final Home Energy Rating Report • ANSI/ASHRAE/IES Standard 90.1-2010 documentation • Final Energy Audit 	John Keress	John.Keress@iowa.gov