

APPENDIX A

APPLICATION INSTRUCTIONS

A. General Overview of 2019 Funding Round Pre-Application and Application

- 1) The 2019 funding round has a two-stage on-line Application process: Pre-Application and threshold Application.
- 2) Developers planning to submit a Tax Credit Application in the 2019 funding round must submit a Pre-Application to IFA through the on-line Application on November 1, 2018, 4:30 p.m. C.S.T.
 - The Pre-Application shall help determine market feasibility for each proposed project's Pre-Application submission.
 - Payment of the market study fee shall be made at Pre-Application submission.
 - The market study report shall be available through the Overview tab of the Application.
 - Each Developer shall be responsible for reviewing the market study report and making the required changes to the threshold Application prior to submission to IFA.
- 3) Applicants for Low-Income Housing Tax Credits under the 2019 Housing Tax Credit funding round will be required to submit a complete Application through the online Application between January 14, 2019 and 4:30 p.m. C.S.T. on January 16, 2019.
 - Payment of the application fee is required at submission of the threshold Application.

B. The On-line Pre-application

- 1) The on-line Application is available on the 2019 LIHTC webpage at the following link: [2019 LIHTC webpage](#).
- 2) Only registered and approved users may access the on-line Application.
- 3) Log into the on-line Application.
- 4) Select "Create new 9% Application" or "Create new Supportive Housing for Families Application".
 - All tabs of the 2019 on-line Application "Application" will appear.
- 5) Enter required Pre-Application information and upload required Pre-Application exhibits. The Pre-Application consists of eight (8) tabs ("Pre- Application"). Refer to the 2019 On-line Application Training Guide for specific instructions.

On the Tabs listed below, enter the following information:

- a) Project Name and Location:
 - Project Name and Political Jurisdiction name (contact information not required in the Pre-Application)
- b) Project Description:
 - Project Type;
 - Minimum Set-Aside election;
 - Occupancy Type;
 - Location Near Services;
 - Other Elections; and
 - Rental Assistance
- c) Site Description:
 - Enter information on the current use of the property, adjacent property land uses, and surrounding neighborhood;
 - Location and Site Requirements;
 - Access to Utilities and Paved Roads;
 - Site Characteristics; and
 - Zoning
- d) Ownership Entity:
 - Company name, address, city, state, zip and contact information
- e) Qualified Development Team:
 - Add new Team Member;
 - Team Member Type – Developer or Co-Developer; and
 - Address, city, state, zip, phone, email and contact information
- f) Project Amenities:
 - Complete the entire tab

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g) Buildings:

- Add New Building(s);
- For each building entered:
 - ✓ Primary Address;
 - ✓ Address, street, city and 9-digit zip code;
 - ✓ Small Area DDA – zcta (Yes or No);
 - ✓ Prior LIHTC section;
 - ✓ New or Acquired;
 - ✓ If Acquired- enter date constructed and date Placed-in-Service by Previous Owner, if applicable;
 - ✓ Number of stories;
 - ✓ Building Type;
 - ✓ Expected Placed-in-Service Date;
 - ✓ Number of Fully Accessible, Accessible Type A Units and Units with Communication Features;
 - ✓ Answer question on the heating/cooling/water heating in each Unit;
 - ✓ If building common space only, check the box;
 - ✓ If Project has Federal Project-Based Rental Assistance, select extend rent limit and enter the Contract Number;
 - ✓ Utilities Included in Rent;
 - ✓ Tenant Paid Utilities;
 - ✓ Mandatory Charges;
 - ✓ Sub-metering;
 - ✓ Building includes section;
 - ✓ Main entrance area;
 - ✓ Square Footage; and
 - ✓ All Unit information

h) Exhibits – upload the following:

- Exhibit 11T – Utility Allowance Documentation;
- Exhibit 12T – Market Study Documentation (Optional);
- Exhibit 3B – Color Photos of Project and Adjacent Property;
- Exhibit 4B – Maps; and
- Exhibit 5B – Site and Floor Plans

- 6) Completion of Application tabs, that are not required tabs for the Pre-Application, is optional through submission of the Pre-Application.
 - Red x's will remain on any tab that is not required for the Pre-Application; however, these red x's will not prevent submission of the Pre-Application to IFA.
- 7) Select "Submit".
 - Error messages will display specifically and solely for the (8) Pre-Application tabs.
 - Once the Pre-Application is submitted to IFA, the status of the Application becomes Threshold InWork.
- 8) The Developer shall receive an email when the market study report is available in the Overview Tab of the Application (on or about December 14, 2018).
 - Each Developer is responsible for reviewing the market study report and making the market study required changes to the Application.

C. The On-line Application

- 1) Complete entries in all Application tabs and upload required exhibits in the threshold Application.
 - All market study recommended changes shall be made in the Application prior to submission of the complete threshold Application.
- 2) Select "Submit".
 - Error messages will display for all tabs.
 - If no errors, proceed with the Application fee payment and submission of the threshold Application to IFA.
- 3) Per Section 3.2.2 – After Application Submittal of the 2019 QAP, once the Application is received by IFA an Applicant shall not contact any IFA staff or Board members, nor shall anyone contact IFA staff or Board members on the Applicant's behalf, in order to unduly influence IFA's determination related to the award of Tax Credits. If it has been determined by IFA that a staff member or Board member has been improperly contacted by the Applicant or a party on behalf of the Applicant, then the Application shall be withdrawn by IFA from consideration for LIHTC. The only exception is when IFA contacts an Applicant to clarify a threshold item within the Application.

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- 4) Once the threshold Application is submitted to IFA, it shall be unavailable to the Applicant until such time that the Applicant needs to make a change per IFA's request. The Application will then be available to the Applicant to make only IFA requested changes during the threshold deficiency review period.
- 5) An email notification is sent to the Owner Contact(s) when the deficiency report in the Threshold Deficiency InWork Application is available for review and response. The Applicant shall respond in the Deficiency Report and make corrections within the appropriate Application tabs as requested.
- 6) A change in funding sources, including equity pricing, shall not be allowed during the deficiency period, unless requested by IFA.

D. Nonprofit and Supportive Housing for Families Set-Aside Submissions

- 1) Projects requesting the Nonprofit Set-Aside shall submit the nonprofit entity approval request for each Project on the Nonprofit Set-Aside tab in each Application no later than 4:30 p.m. C.S.T. on November 30, 2018. Refer to QAP Section 2.2.1 – Nonprofit Set-Aside and 2019 Appendix K.
- 2) Projects applying for the Supportive Housing for Families Set-Aside shall submit the qualified service provider request for each Project on the 2HSA tab in each Application no later than 4:30 p.m. C.S.T. on November 30, 2018. Refer to QAP Section 2.2.2 -- Supportive Housing for Families Set-Aside and 2019 Appendices K – Exhibit & Scoring Checklist and M -- Supportive Housing for Families Set-Aside.

E. Scoring

- 1) Changes to the Application shall not be allowed that maintain or improve the preliminary score received by an Applicant.
- 2) IFA will make the final scoring determination of each Application per QAP Section 6 – Scoring Criteria.

***REMINDER:** Per QAP Section 9.2 – Binding Obligations, “The representations made in the Application shall bind the Applicant and shall become a contractual obligation of the Developer and the Ownership Entity and any Entity the Developer or the Ownership Entity is representing in the presentation of the Application or a successor in interest in the event Tax Credits are awarded to a proposed Project.”