IFA must receive ALL the required documents listed below and *Certification Portal (CP) f/k/a Certification On-line* submissions (COL) must be completed by the date due to satisfy Program reporting requirements. If any of the required documents listed and building/unit histories are not submitted through CP by the due date, it will be considered an incomplete submission, and a 90-day correction notice will be issued.

Project Name: _____ Project No: _____

- ☐ **2024 Owner's Certification of Continuing Program Compliance:** Signed and dated by the duly authorized representative of the Ownership entity.

- ☐ **Copy of Owner Executed Form 8609(s)** (Part II completed and signed) –If not previously submitted*   ☐ N/A

- ☐ **Utility Information Form** and supporting documentation from the utility source.

- ☐ **Exhibit F:** Compliance Monitoring Information Form – Please note that only projects that have had management or ownership changes and that have not reported this to IFA, need to provide this form.

- ☐ **Copy of 2024 Annual Fire Safety Inspection** (i.e., billing statement from a qualified inspector or business, work order signed and dated by qualified inspector, receipts for annual extinguisher(s) tags &/or purchase). NOTE: This requirement does not apply to one- or two-unit dwellings such as single-family homes or duplexes.   ☐ N/A

- ☐ **Project Occupancy Data** has been submitted through the Asset Management Portal (AM). (See below for further instructions)

- ☐ **All Buildings have been submitted through the Certification Portal (CP)**. (See below for further instructions)

PROCEDURES FOR REPORTING UNIT DATA THROUGH THE CERTIFICATION PORTAL (CP)

- · 100% Low Income Projects are required to annually report initial certifications. For existing households, the new certification date entered needs to be the effective date of the Student Status Certification (must be within 365 days of the previous year's effective date) and rents. If the Owner has opted to continue full recertifications or received points for recertifying households annually, enter the effective date of the recertification.

- · Mixed-Income Projects will report all initial certification and re-certification information for all units occupied by households being used to fulfill state set-aside requirements as detailed in the Project's LURA. If all LIHTC units are not recertified, the new certification date entered needs to be the effective date of the Student Status Certification (must be within 365 days of the previous year's effective date.

- · Mixed Use Projects will report all initial certification and re-certification information for all low-income units.

- · HOME/NHTF ONLY Projects are required to use this system for reporting all unit activity for the 2024 reporting year. If you need access to the system for reporting, please contact your assigned Compliance Officer.

PROCEDURES FOR UPLOADING ANNUAL REPORT DOCUMENTATION THROUGH THE CERTIFICATION PORTAL (CP)

The CP is used for the upload of annual report documentation (as well as tenant files and Project level documents).

A guide has been created and is found on our webpage under the Certification Online Reporting System tab on the IFA Compliance Page. This page is located at: https://www.iowafinance.com/secondary-resources-archive/?program=home-program.

Should you have any questions or need technical assistance regarding the Certification Portal, please contact your assigned Compliance Officer.

PROCEDURES FOR THE ASSET MANAGEMENT PORTAL (AM)

The AM portal allows Projects to enter their occupancy data which should be done at least quarterly throughout the reporting year. However, if that has not been done or entered through year-end 2024, please log into AM and enter your project's occupancy information.

If you are having issues accessing AM, please follow the instructions below.

1. Log into CP at https://cp.iowafinance.com/ and right click on your name to get into "My Account". Verify your email address is correct. Change if it isn't correct and wait 10 minutes for the applications to update.

2. Go to the AM website at https://am.iowafinance.com/login.aspx and click on "forgot password". Enter your Username and email address and click "submit". You will receive an email with a temporary password. Log into AM with your temporary password and you will be asked to set up a new password which can be the same one that is used for CP. Note that the password in each application will need to be maintained separately.

Note that financials and other documents are required to be uploaded based on the type of project and its financing. The Compliance Officers and Underwriters will monitor projects throughout the year for these items.

Any questions specific to your Project should be addressed with your assigned Compliance Officer or you may contact Tim Morlan, Asset Management Director at tim.morlan@iowafinance.com or at 515.452.0438.