SECTION VI
VIEWING AND ADDING PROJECT INFORMATION
VI. VIEWING AND ADDING PROJECT INFORMATION

This section is broken down by each screen related to viewing and editing a property with steps using them. They include:

A. Property Listings
B. Property Details Screen
C. Building Details Screen
D. Unit Information Screen

Step 1: Select: Tenant Income Certification/Owner Certification from the Program Screen

A. Property Listings

Step 2: Find and Select: the Property for which you want to add information

- All of the properties assigned to you are listed in alphabetical order

Note: “Show All Reporting Years” is grayed out until filter for Property Name is used.

Reminder: Eff Date - shows the reporting year for a property – only the most recent will appear initially
• You can **filter** using Property Name or Status by clicking on the funnel to the right of the header
  ◦ When you click on the funnel, a blank space appears
  ◦ Type in the property name and press Enter
  ◦ To get back to all properties, click the funnel next to property name and delete the text and press Enter

• You can **sort** the Property Name list by clicking on the column name
  ◦ It will sort A-Z (or)
  ◦ Z-A

• Status: A property can be in one of six status stages:
  ◦ **Active** - The property is open for the certification year
  ◦ **Property Review** - The property is in the finalization process but can be edited
  ◦ **Finalized** - The property has been finalized for OHFA review. Editing is no longer possible for tenant events in that reporting year.
  ◦ **Monitoring** - OHFA reviews the property before completion
  ◦ **Resolution** - OHFA reviews the property before completion
  ◦ **Completed** - Finalization of the property has been approved by OHFA and property has been closed for that certification year

**B. Property Details Screen**

• Once a property is selected an overview of the Project will appear
• This Screen is Read-only, if any of the information needs updated contact the DevCo Helpdesk at [https://devco.ohiohome.org/devcoinquiries](https://devco.ohiohome.org/devcoinquiries)
  ◦ Programs - Includes all active OHFA programs with the award number, the number of units and buildings with that funding type at the property
  ◦ Owner Entity Information - Displays the current contact information listed in DevCo for the owner
  ◦ Management Company - Displays the current contact information listed in DevCo for the Management Company including a primary contact and onsite manager

![Property Details Screen](image.png)

**Note:** Names or addresses displayed may be cut off if the number of characteristics exceeds the space available.
• Owner Certification Year is very important (e.g. rental & OHFA compliance events 1/1/15-12/31/15)
  ◦ All TICs entered under this specific Property screen must have the same year (e.g. 2015)
  ◦ An error will occur if you update a TIC with an effective date that is not in the certification year
  ◦ If you are in the wrong certification year, you will have to go back to the Properties listing and choose the correct effective year (reporting year) for the property

• Compliance Checks - Property Errors
  ◦ A link to a collective list of warnings and errors from the property events are at the top of this screen, severities include:
    • **Errors** - Will not let you finalize your project at the end of the year; reflects mostly items not entered
    • **Warnings** - Will let you finalize; reflects items that may be an issue
      (See Section VII B. Compliance Checks – Errors & Warnings for more information)
  ◦ Select: Click to display
  ◦ You can get to each TIC with the error/warning by clicking on the link in the event column
Through the side panel on your left you can navigate and select specific property details: buildings, units and events.

Navigating through the Side Panel

A. Building Details Screen
   - All of the BIN numbers are listed under Project Name.
   - Click on the (+) by a BIN to expand it to see the unit numbers.
   - Click on the BIN number and the Building Details Screen will appear.

B. Unit Information Screen
   - Click on the (+) by a unit number to expand it to see Events added.
   - Click on the Unit number and the Unit Information Screen will appear.

C. Event Details Screen
   - Click on an event, such as Move-in to view an existing event
   - Select: Add New Event to get a blank Certification to create a new TIC.

Step 3: Add the Utility Allowance for the project if you have not already
(See Section V. Adding a Utility Allowance for detailed instructions)
C. Building Details Screen

Step 4: Select a BIN number you want to add information to (Side Panel)

- An overview of the building appears
- You can view and verify basic building information
  - Verify Building Identification Number or if not a Housing Tax Credit project the Identifying Name
  - Verify Address of Building (See recommended format listed in Section VI. D. Unit Information)
  - Owner Pays Utilities- check box, if owner pays all utilities.
  - Notes Section - is used to identify any issues or special characteristics about this particular building.
- Contact the DevCo Helpdesk if information is listed incorrectly.

![Building Details Screen](image)

D. Unit Information Screen

Step 5: Select: the Unit you want to view

- Choose the unit from the Unit Name below the building information -or- Choose the unit from the list under the BIN on the left of the screen as shown above
- You can see an overview of the unit.

![Unit Information Screen](image)

Reminder: Make sure the unit identity is correctly marked on each unit, because this impacts the number of qualified units on the Annual Certification.
• Verify any information, and update as needed; such as:
  ◦ Unit Number - We have a recommended format if your organization lists a unit number with abbreviations of street names.
    ◦ Recommended Formatting:
      ▪ Abbreviate street directions as a capital letter with no punctuation (e.g. N or SW)
      ▪ Use standard post office street abbreviations with no punctuation (e.g. St or Dr)
        ▶ Standard abbreviations can be found here: https://www.usps.com/ship/official-abbreviations.htm
      ▪ Include apostrophes, no hyphens when present in street addresses (e.g. O’Hara Ln)
      ▪ Enter numbered streets as the number with the appropriate suffix (e.g. 1st or 133rd)
      ▪ Capitalize the start of each word in an address (e.g. High Tree Ln)
  ◦ Number of Bedrooms
  ◦ Square Footage
  ◦ AMI Percentage
  ◦ Unit Identity - Owner/manager needs to update this to communicate to OHFA which units they are.
    ▪ Make sure the unit identity is correctly marked on each unit, because this impacts the number of qualified units on the Annual Certification
    ▪ Program Unit (LIHTC, HOME, TCAP, etc)
    ▪ Manager
    ▪ Maintenance
    ▪ Model
    ▪ Security
    ▪ Market
    Note: Non-program units must be approved by OHFA
  ◦ Status Date - Updates based off of the last tenant event
  ◦ Status - either Occupied or Vacant based off of current tenant events
    ▪ Use the DevCo Helpdesk at https://devco.ohiohome.org/devcoinquiries if you need this updated
• Funding Program
  ◦ If you Select: Add Funding, the following appears:
    ![Funding Program Table]
    ◦ Since most HOME units Float; this is a good method to track them.
    ◦ Once changes are completed Select: Update
    ◦ If unit is created accidently and needs to be deleted, contact the DevCo Helpdesk