The Ohio Housing Finance Agency is an Equal Opportunity Housing entity. Loans are available on a fair and equal basis regardless of race, color, religion, sex, familial status, national origin, military status, disability or ancestry. Please visit www.ohiohome.org for more information.
INTRODUCTION
This guide is to assist you through our Online DevCo System. It is a general procedure guide. The screens may change due to updates. This guide focuses on compliance and will take you through the registration of your organization and getting permissions to your projects through finalizing a project.

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For questions or issues please contact the DevCo Helpdesk at https://devco.ohiohome.org/devcoinquiries.
SECTION I
ACCESSING AND REGISTERING IN DEVCO
I. ACCESSING AND REGISTERING IN DEVCO

DevCo Online is an online database that allows for the management of compliance properties & applications for allocations. This section focuses on the access and registration for compliance staff of properties with OHFA funding.

- OHFA allows Owner access by granting an organization code
  - Online - Property Owner is either defined by
    - General Partner -or-
    - Managing Partner if part Owner
  - Owner grants access to other users by approving requested access such as Management Companies or Syndicators.

Registering in DevCo

- All contacts need to register to use the system
- The Owner needs to request Online-Property Owner before any additional access can be requested
- All other users, including management, will register and be managed by the Online-Property Owner
- Each organization should use their organization information when registering.
- Role User has at property with corresponding DevCo Property Access Type and who approves each Type:

Step 1: Enter DevCo Online Management System

https://devco.ohiohome.org/AuthorityOnline/Default.aspx
- Notice: the various Browsers that support the Online System
  - Compatible with Mozilla Firefox, Google Chrome and Internet Explorer.
- Select: New User? Register here
Step 3: Fill in the Profile Information

- Name
- Email - your username defaults to your email address. You can change this to whatever you prefer.
- Password

Step 3: If you know your Organization Code (a code that is generated in DevCo)

- Enter the Code and Select: Load
- Organization information will auto populate from DevCo
- Check for errors in the Organization information, if there are errors use the DevCo Helpdesk at https://devco.ohiohome.org/devcoinquiries
- If you Do Not have the Organization Code
  - Check the box: “My organization is not registered”
  - Manually add the Organization information below it

**Passwords must be at least 7 characters and contain one number**

Step 4: Select the appropriate Access Types for the Online- Property Owner:

Online-Property Owners should request:

- **Manage your Organizations Information and Users** - this will allow you to manage the information about your organization such as contact information, users, partnerships and partners.
- **Annual Owner Certification and 8609 Access for Rental Housing** - this will allow you to manage information about projects/developments you are affiliated with; e.g., the completion of Annual Certifications and Tenant Income Certifications.
- All others only need to request Annual Owner and Tenant Income Certifications. See Step 6 for more details on property access types.

(If access to more than one organization is needed, see Section IV Accessing More than One Organization to add another organization after registration is complete)

The following access type does not affect compliance, but is part of the choices:

- **Online Application Access for Developers Only** - a Planning and Development type of access, allowing applicants to enter information online.
Step 5: Select: Next

Step 6: Owner Certification (Property) Access
(Appears after clicking on Annual Owner Certification and 8609 Access for Rental Housing)

• Add project numbers you are affiliated with one at a time
  ◦ Enter Award Number/Project Number
  ◦ Select your role:
    • Owner - Used by contacts for the owner of the property
    • Additional Access Types: Property Manager and Other should be used by the managers or syndicators asking for access from the Online Property Owner
  ◦ Select: Add

• Repeat above for each project
• Select: Next
**Property Access Groups Defined:**

- **Online- OC Editor**
  - Edit and View Tenant Events
  - Edits and View Annual Reports

- **Online- OC Viewer**
  - View Tenant Events
  - View Annual Reports

- **Online- Property Owner** - We recommend one per project
  - Overseer of Organization & Properties
  - Assign rights to managers
  - Edit & Submit Events
  - Manage Users
  - Finalize the Project

- **Online - Property Manager**
  - Assign other managers (i.e. onsite) to edit events
  - Edit & Submit Events
  - Oversees the managers’ rights in DevCo

**Access Types not Used by OHFA in DevCo:**

- Online- 8609 Progress Report Editor
- Online- 8609 Progress Report Manager
- Online- 8609 Progress Report Viewer

**Note:** If you add a Project without the Owner being registered you will receive an error, please contact the owner.

---

**Owner Certification Access**

*Property Award Numbers*

Add the Award Numbers for the properties you would like access to. Indicate whether or not you are the owner by checking the box before clicking “Add.”

Unable to add requested Award Numbers. Either the Award Numbers was not found, or the owner has not registered. Contact the property owner or OHFA to verify the owner is registered.

Award Number Example: 020006

<table>
<thead>
<tr>
<th>Access Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
</tr>
<tr>
<td>Property Manager</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

**OHFA Recommends:** Property Managers use Online-Property Manager or OC Editor. Investors, Syndicators use OC Viewer access.

---

**Step 7: Complete the Manage your Organization Information Screen**

- (Appears after clicking on Manage your Organization Information)

- **For Owners:**
  - Use dropdown to pick Organization Role: **Owner**
  - Other roles in dropdown are if you have a manager or syndicator who wants to view/edit the organization information not just projects or for the online application.

- **For Managers or Other users:**
  - Use dropdown to pick Organization Role: **Management** (or other applicable)
  - Select: **Add**
  - Select: Any additional roles and **Add**
  - Once finished, Select: **Next**
Step 8: Select: Submit

- A message will appear stating you may have to wait up to 3 business days for approval
- An email will be sent to the same email account you registered with; approving or denying your request for access

NOTE: One account can be registered as the user for multiple projects.
Step 9: Check your email for access information
The online system will send an email similar to the examples below whenever access is approved or denied:

- Granting access to your Organization as an Administrator

![Permission Change](image)

- Denying or Approving Access to a specific project
  - Contact the DevCo Helpdesk at [https://devco.ohiohome.org/devcoinquiries](https://devco.ohiohome.org/devcoinquiries)

![noreply@ohiohome.org](image)

- For Management: Access is owner driven, please contact the owner to have your access approved.
- For Users with view only access: Access is owner driven, please contact the owner to have your access approved.
- For Owners: If you do not receive an email message within 3 business days please check your same folder then use the DevCo Helpdesk at [https://devco.ohiohome.org/devcoinquiries](https://devco.ohiohome.org/devcoinquiries).

Step 10: Log into DevCo Online

- If your initial access has not been approved you will get an error message that your login information is invalid.
Step 11: Read and select “I agree” or the process will not move past this screen

- A message will appear once you login
- If you click on “I Disagree” it will take you to the log-in screen shown above

I affirm that I am an employee or designated user for the organization that I am associated with as listed above. I agree to utilize this application and the data that I access for no purpose other than the submission of information to this agency as it directly relates to my job.

I agree to adhere to all privacy and data security policies of this agency and my organization. I affirm that any personal information or private information that is obtained through this web application will not be used for purposes other than its intended use and I will not forward or publish this information without prior approval from this agency.

I hereby certify that any information submitted into the Ohio Housing Online Management System by me is true, accurate, and complete. I understand that any information, documentation, etc., submitted by me is related to programs that are funded with federal and state funding sources, and any false claims, statements, documents, testifications, or concealment of material facts, may be prosecuted under applicable federal and state laws and may result in criminal and/or civil penalties.

18 U.S.C. § 1001, “Fraud and False Statements,” provides among other things, in any matter within the jurisdiction of the executive, legislative, or judicial branch of the Government of the United States, anyone who knowingly and willfully, (1) falsifies, conceals, or covers up by any trick, scheme, or device a material fact; (2) makes any materially false, fictitious, or fraudulent statement or representation; or (3) makes or uses any false writing or document knowing the same to contain any materially false, fictitious, or fraudulent statement or entry, shall be fined under this title, and/or imprisoned for not longer than five (5) years.

I have read and agree to these terms as listed above.

After Selecting: I agree; the Programs Screen will appear similar to the screen below.
Step 12: Programs Screen Overview (homepage)

- Once you select “I agree”: The Program Screen should look similar to the example below based on your access rights (Annual Owner Certification and 8609 Access for Rental Housing & Manage your organizations information and users)
  - Tenant Income Certification/Owner Certification – View and add project information
  - Progress Report – 8609 progress reports
  - My Organization – View organization information
  - My Profile – Where you can add projects that you need to access
- DevCo has 60 minute work sessions
  - There is a countdown timer in the right hand corner
  - When the session expires, a message will appear asking if you would like to refresh your session
  - If you do not refresh; the system will log you out
SECTION II

MANAGE (PROPERTY) USERS
II. MANAGE (PROPERTY) USERS

Users with online owner or property manager access are responsible for approving access for their properties.

Step 1: Make sure you are on the Correct Organization, if you are managing more than one.

- The organization can either be viewed under My Profile or Properties Listing (Tenant Income Certification/Owner Certifications)
- To change your organization, go to Profile: Change Organization
- Highlight the Organization you want
- Check for errors in the Organization information
  - If there are errors use the DevCo Helpdesk at https://devco.ohiohome.org/devcoinquiries
- Select: Set
Step 2: From the Programs Screen; Select: Tenant Income Certification/Owner Certification

- Double click on the Project
- If you have more than one project you will have to manage the users for each project separately

Step 3: Select: Manage Users from the Side Panel

Step 4: Review Current Users

- Current Users will be shown in the upper area of the screen
- The access given is highlighted in blue
- You can Update or Remove access with the buttons to the right

All Access Groups that are available in the drop down box include:

8609 Related Access (Note: this group is not used)
- Online- 8609 Progress Report Viewer
- Online- 8609 Progress Report Editor
- Online- 8609 Progress Report Manager

Annual Reporting/ Compliance Related
- Online- OC Editor
  - Can edit Tenant Events (TICs) in DevCo
- Online- OC Viewer
  - Can view Tenant Events and Annual Certification in DevCo
- Online- Property Manager
  - Can approve some access to properties, complete Tenant Events, and edit the Annual Certification
- Online- Project Owner
  - Same access as manager & can submit Annual Certifications, Finalize Year, and approve organization access

Step 5: Review Users that requested access

- User Access Requests will be shown in the lower area of the screen
- You can Approve or Deny with the buttons to the right
  - Highlight the Access Groups and Select Approve or Deny
- An email will be sent to the address on the screen approving or denying access
  - Note: There may be a time delay or the email could get stuck in a spam folder. If they need to know immediately that they have access, contact them separately from the automated email.
SECTION III
VIEWING AND ADDING ADDITIONAL PROJECTS
III. VIEWING AND ADDING ADDITIONAL PROJECTS

A. View Projects for which you have DevCo approved permissions:

Step 1: From the Programs Screen Select: Tenant Income Certification/Owner Certification

- The Properties Listing Screen Appears
  - This will show you the projects for which you have approved access
  - If you do not see any properties listed or a property is missing contact the DevCo Helpdesk at https://devco.ohiohome.org/devcoinquiries
- To view a property, click the link to the property for the reporting year (Eff Date) that you want to view or edit
- From this screen you can also view My Profile, Return to Programs Listing (homepage), and Request another Property

B. Adding Additional Projects to your Properties Listing:

- There are two links as options for accessing the Property Request Screen:
  - Using the link on the Property Listing page (option A) or on the My Profile Page (option B)

Step 1 option A: Select: Request another property on the left side panel of Property Listings

- Owner Certification Access appears- begin at Step 5
Option A

Step 1 option B: Select: My Profile from the Programs screen
- Program screen also provides access to Change your password, View your Profile, and View User Access

Step 2 option B: Select: Request New Access from the left hand panel under Profile

Option B

Step 3 option B: Select: Organization
- If you have more than one, select the organization associated with the property (See Section IV. Accessing More Than One Organization)

Step 4 option B: Check access for Annual Owner Certification and 8609 Access for Rental Housing, and then click Next
Step 5: Fill out Owner Certification (Property) Access
Appears after clicking on Annual Owner Certification and 8609 Access for Rental Housing
- Add project numbers you are affiliated with one at a time
  - Enter Project Number, aka OHFA tracking number
  - Select your role: Owner, Property Manager, Other
  - Select: Add

- Repeat above for each project

Note: When adding projects do approximately 5 at a time or you may receive an error, and if more properties need to be added see Section III. Viewing and Adding Additional Projects. You will have to wait until access is approved for the initial properties requested are approved before requesting access to others.
- Select: Next
Step 6: The Registration Summary Screen will appear; Select: Submit

- A confirmation message appears at the bottom of the screen if you have successfully completed the new request.

**Return**

Your registration information has been submitted and is being processed.

An email notification will be sent to you upon approval or denial.

Please be aware that your request may take up to 3 business days to be processed.

Step 7: Check your email for access information

- *For Management:* Access is owner driven, please contact the owner to have your access approved.
- *For Users with view only access:* Access is owner driven, please contact the owner to have your access approved.
- *For Owners:* If you do not receive an email message within 3 business days please check your spam folder then use the DevCo Helpdesk at [https://devco.ohiohome.org/devcoinquiries](https://devco.ohiohome.org/devcoinquiries)

Step 8: From the Programs Screen; Select: Tenant Income Certification/Owner Certification

- The Properties Listing Screen Appears
  - This will show you the projects for which you have approved access.

**Properties Listing**

- **Eastman Properties (Test)**
  - Street: 23 Test St
  - Phone: 614-406-4385

**Properties Assigned to you:**

<table>
<thead>
<tr>
<th>Property Name</th>
<th>2</th>
<th>DT Date</th>
<th>Status</th>
<th>Award Number</th>
<th>Num Buildings</th>
<th>Num Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forest G. Plus (TEST)</td>
<td>2013</td>
<td>Active</td>
<td>F-A-10-999-99</td>
<td>199999</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>Forest G. Plus (TEST)</td>
<td>2014</td>
<td>Active</td>
<td>F-A-10-999-99</td>
<td>199999</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>Ledinah Cares (Test)</td>
<td>2013</td>
<td>Active</td>
<td>070205</td>
<td>3</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>Ledinah Cares (Test)</td>
<td>2014</td>
<td>Active</td>
<td>070205</td>
<td>3</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>Ledinah Cares (Test)</td>
<td>2013</td>
<td>Active</td>
<td>J0-000-000</td>
<td>000000</td>
<td>5</td>
<td>50</td>
</tr>
<tr>
<td>Ledinah Cares (Test)</td>
<td>2014</td>
<td>Active</td>
<td>J0-000-000</td>
<td>000000</td>
<td>5</td>
<td>50</td>
</tr>
</tbody>
</table>
SECTION IV
ACCESSING MORE THAN ONE ORGANIZATION
IV. ACCESSING MORE THAN ONE ORGANIZATION

- To be used when you are working at or affiliated with multiple organizations

Step 1: Select: My Profile

- Select My Profile

Step 2: Select: Request New Access

- Select Request New Access

Step 3: Choose “Unlisted” under Organization drop down
Step 4: Add in the Organization Code or fill in the Organization Details.

- The organization must be registered to move past this screen
- Use the organization code to request access
  - If you do not have your organization Code, checking the box for My Organization is not registered will enable you to request access to this project
    - Enter Organization Details

Request New Access

- Check for errors in Organization info, If there are errors use the DevCo Helpdesk at https://devco.ohiohome.org/devcoinquiries
- Select: Access Types needed
  - If you select Annual Certification and 8609 Access for Rental Housing you can also request properties during this process
- Select: Next

Step 5: Enter your organizational role

- Choose your role from the drop down box
- Select Add
- Select Next
- You will see a receipt for your registration
**Step 7: Check your email for access information**

- *For Management:* Access is owner driven, please contact the owner to have your access approved.
- *For Users with view only access:* Access is owner driven, please contact the owner to have your access approved.
- *For Owners:* If you do not receive an email message within 3 business days please check your spam folder then use the DevCo Helpdesk at [https://devco.ohiohome.org/devcoinquiries](https://devco.ohiohome.org/devcoinquiries)

**Step 6: Once you have gained access**

- You can change which organization you are affiliated with by:
  - Selecting: **Change Organization** from your Profile
  - From the Drop Down pick which organization you want
  - Select: **Set**
- Your current organization will be listed at the top of the page
SECTION V

ADDING UTILITY ALLOWANCE(S) TO A PROJECT
V. ADDING UTILITY ALLOWANCE(S) (UA) TO A PROJECT

• Due to limitations in DevCo you must enter UAs annually even if the effective date is unchanged.
  ◦ Unless updated, the last effective UA will appear in the dropdown box of the TIC
  ◦ UA(s) entered in the system remain active for one year; if another one is effective before that timeframe they both will show

Step 1: Go to the Property Details Screen

• Select: Tenant Income Certification/Owner Certification from the Program Screen
• Select: A Project you want to add the utility allowance

Step 2: Click on Utility Allowance

Step 3: Either Add New or Copy

• The current UAs and the UAs from the previous two reporting years will be displayed in the list on the Utility Allowance screen.
• Add New
  ◦ This will add a blank screen to enter data in
• See Step 8 for copying a UA from one reporting year to the next
  ◦ Replicates the record so you can do minor updates, e.g., effective date change
Step 4: Fill out the general information

- The BINs (Building Identification Number) are listed to the right
  - You must select the BINs to which the UA will apply before you save and exit or the info you filled in will not save
- Fill in:
  - **Description** - this is what will appear when filling out the TIC, therefore, if you have multiple types, unit styles, or bedroom sizes you will want to mark the UA in a way you can tell them apart. The more descriptive the better and consistent, e.g., 2 bdrm garden PHA 1/1/14; 2 bdrm townhome PHA 1/1/14.
  - **Allowance Type** - is the Utility Allowance used
  - **Verified Date** - date that the utility allowance was reviewed for any changes. OHFA recommends utility allowances are reviewed quarterly to insure there are no issues with Gross Rent.
  - **Effective Date** - the true effective date of the UA e.g. PHA UA for Fairfield county is unchanged since March 2, 2014, but they were last reviewed January 1, 2016.

Step 5: Fill out specific UA type information

- **Source** - From the Drop Down; Select the source for each utility type:
  - Gas
  - Electric
  - Oil
  - L.P. (liquid propane)
  - Other (e.g. sewer, trash)
  - All
- **Amount** - Manually Enter
- **Paid By** - From Drop Down; Select:
  - Owner Paid - OHFA does not need to know how much owner pays. The Owner paid drop down is for Owner/Manager use only.
  - Tenant Paid
- **Allowance Type** - From Drop down; Select from the accepted OHFA UAs listed.
  - HUD Rent Schedule
  - OHFA Approved – Energy Consumption Model
  - OHFA Approved – Consumption
  - OHFA Approved – HUD Utility Model
  - OHFA Approved – Utility Company Estimate
  - Public Housing Authority (PHA)
  - Rural Development
  - Owner Paid Utilities

Note: You must select BINs to save correctly.
For Example; below is a sample of a PHA and a Utility Allowance filled out in Online- DevCo

Step 6: Once Data is filled out; Select: Save
Step 7: Make sure the new UA was added to your list.

- The current UAs and the UAs for the previous two reporting years will be displayed in the list on the Utility Allowance screen.

![Utility Allowances](image)

- If UA is not visible, check for UA by going back to the property listing page and Select: the reporting year (Eff Date) that matches the UA effective date and Select: UA button from the Property Details. If you still do not see it use the DevCo Helpdesk at [https://devco.ohiohome.org/devcoinquiries](https://devco.ohiohome.org/devcoinquiries)

- An alert will then be displayed on Property Details screen to update the Utility Allowance on all units when a UA with a new Effective Date has been entered into DevCo. Note: Each current resident will need to be updated within 90 days of the Effective Date.

Step 8: Copy and Update UA for New Year

- Copy replicates the record so you can do minor updates, e.g. new effective date change
- This step described using the copy feature; however an update could be done using Add New
- Click Copy from the Utility Allowance field
- Update Utility Allowance description
- Update the fields that have changed
  - Note: At minimum the effective date in DevCo must be updated yearly even if there has not been a new Utility Allowance published in years. If it is unchanged the only field that needs updated is the Verified Date, and it is recommended to modify the Description.
- Double check that correct BINs are indicated
- Save the new UA
- Review if the UA was added and switch reporting years, if needed

Step 9: Owner Paid Utilities

- Select Tenant Income Certification/Owner Certification
- Select: A Project you want to indicate Owner Paid Utilities on
- Owner Paid must be indicated on each building separately
- Select BIN
- On the Building Details screen select Owner Paid Utilities
- Repeat selection on each building
- If events were entered before the Owner Paid UAs was indicated you will need to select each event and click update to clear the Utility Allowance error listed on the event
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

Reminder: Eff Date - shows the reporting year for a property - only the most recent will appear initially

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

---

**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.

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.

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](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](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 accidentally and needs to be deleted, contact the DevCo Helpdesk
SECTION VII

TENANT INCOME CERTIFICATIONS
VII. TENANT INCOME CERTIFICATIONS

- This section can be broken down into:
  A. Event Details- Manually Adding TICs (current Move-ins & Recerts)
  B. Compliance Checks - Errors and Warning
  C. Viewing & Printing the Tenant Income Certification (TIC)
  D. Other Event Updates
  E. Entering Historic Move-in Events

A. Event Details- Manually Adding TICs (current Move-ins & Recerts)

Important considerations before getting started:

- If your initial information is not in DevCo, please let us know by using the DevCo Helpdesk at [https://devco.ohiohome.org/devcoinquiries](https://devco.ohiohome.org/devcoinquiries)
- All new move-ins need a full certification
- For Housing Tax Credits, a student status needs to be completed every year
- For HOME, follow the HOME recert schedule
- A version of the Tenant Income Certification (TIC) appears ready to be completed
- If you use Housing Tax Credit (HTC) compliance software you can upload your Tenant Information using the produced XML Files
  - Dates should import correctly based on the dates already in your HTC compliance software
    (See Section VIII. Using the Data Import Function (XML Upload) for more information on uploading from HTC compliance software)

Step 1: Select: Add New Event

Step 2: Enter the correct event date.

- Event date year must be the same as the certification reporting year you selected at the Property Listing Screen
- If you change to a different effective date while filling out your TIC, you will lose the information you are entering. You will either get a blank TIC or the last TIC entered
  e.g., 3/17/2013 Event for Tiffin Acres would have to be entered under Tiffin Acres effective date 2013
- Tenant events must be added chronologically.
NOTE: For acq/rehab projects with in-place residents the “move-in” date will be the date the tenant was qualified for the HTC program.

Step 3: Select: Event Type from dropdown
- Fields to enter information into DevCo will vary based on the type of the event selected
- Select: either Move-in or Recertify (See Sect VII. D. Other Event Updates for more details on other types of events)
  - If the date or event type are incorrect you will need to restart the process of adding a new event.

Step 4: Correctly Identify the Unit Identity
- Should be listed as Program Unit unless it is a market unit or a type of employee unit

Step 5: Select: Utility Allowance from dropdown
- Allowance Amount will automatically populate once selection is made
- Make sure Utility Allowances are entered and available from the dropdown box
- If the utility allowance is missing go back to Property Details screen to enter utility allowance (See Section V. Adding UAs)

Step 6: Skip Total Household Income this will automatically populate from income calculation
Step 7: Choose Rent and Income Level % from the dropdown boxes

- 30% is the default rent and income level for Add New Events
- If you have a different Rent Level than what is listed, list it in the Notes box and choose the closest corresponding Rent Level %

  i.e. If you have a 42% rent limit, you would add to the notes: “42% Rent Limit $____ (the amount), under the Rent Level % dropdown box you would choose 50% because it is the next greatest rent level %

- They appear based on the funding source in DevCo, e.g., HTC, HOME

<table>
<thead>
<tr>
<th>Income:</th>
<th>Rent:</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTSP</td>
<td>HERA Special</td>
</tr>
<tr>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>60%</td>
<td>60%</td>
</tr>
<tr>
<td>80%</td>
<td></td>
</tr>
</tbody>
</table>

Note: For more information on HERA Special and the rent & income limits please see the current Income and Rent Limit Implementation Memo (http://www.ohiohome.org/compliance/incomelimits.aspx)

Step 8: Add Tenant Rent Portion

- If the tenant is receiving subsidy in the form of a Housing Choice Voucher, enter their portion of the rent as calculated by the local Public Housing Authority (PHA).
- If the tenant is receiving subsidy that is project-based through either the local PHA or from HUD, then enter the amount listed as the Tenant Rent (TR) as indicated on their 50058 or 50059. If due to low Tenant Payment (TTP) and a high Utility Allowance (UA), the resident is a negative renter that gets Utility Reimbursement check, please use $0 for the rent and list the correct UA for the unit.

Step 9: Add Rental Assistance Amount, Type and Source

- Types: Property Based or Tenant Based
- Sources: Rural, Section 8 Project Based, HOME, Other, TC, Section 8 Tenant Based
- If no assistance, mark zero for the amount and N/A for the type of source

Step 10: Enter: HH Member Count

Step 11: Select: Funding Program

  Note: if funding programs are not selected, the compliance checks in DevCo will not function properly.
  - If a property has Housing Tax Credits (LIHTC) it must be checked on every unit
  - For other funding types they should be checked based on what OHFA programs the household is qualifying for
• All funding types that the household is qualifying for should be selected

**Step 12:** As applicable; enter: Special Needs Code, Is Disabled, and student household fields

**Step 13:** Select: Add Member
- Enter Household member information
- Student Status needs to be entered
- Gender must be filled, if unknown select N/A
- Race, Ethnicity, and Special Needs must be filled in if that information has been disclosed. If undisclosed, do not assume.
- “Hispanic or Latino” and “is Disabled” check boxes must be filled in if that information has been disclosed. If undisclosed, do not assume.
- When entering unborn children all fields must be completed for the social security number, all zeroes can be used and the birth date must be entered with a current or previous date. Both fields can be updated once the information is known.
- Skip Current Income this will automatically populate from income calculation

**Step 14:** Select: Add Non-Asset Income
- Use the dropdown to select the tenant(s) for which you are adding income and enter information

**Step 15:** Select: Add Asset Income
- Use the dropdown to select the tenant(s) for which you are adding income and enter information

**Step 16:** Select: Calculate Total Household Income and Member Income
- Once you select Calculate Total Household and Member Income, the total income will automatically populate to the Total Household Income (at top) and Household Member Current Income (by household member) fields

**Step 17:** Select: Update
Step 18: Must manually enter Household Income at Move-in

Populates from Step 16

Step 18

Note: Skip this step when completing a Recertification. The field will be greyed out and cannot be edited at that time.

Step 19: Select Update

B. Compliance Checks - Errors and Warning

Step 20: Correct any errors and warnings that might have occurred

Same errors/warnings that are linked to the Properties Details Screen in Section VII.

- 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

<table>
<thead>
<tr>
<th>Categories of Errors and Warnings</th>
<th>Error</th>
<th>Warning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Error</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Building Does Not Have A County Selected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Error</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Event Date is Not in Selected Certification Year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Initial Move-In Date is Required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Event Date is Required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event Type</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Error</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Event Type is Required</td>
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</tr>
<tr>
<td>◦ Event Type is Transfer and No Building is Selected</td>
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<td></td>
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<tr>
<td>◦ Event Type is Transfer and No Unit is Selected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funding Program</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Error</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Funding Program Required When Unit is not Market Rate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Income</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Error</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Total Household Income is Required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Household Income at Move-in is Required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Income Level is Required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ All Members Must have An Income Entered</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Income Level is Not Valid for the Funding Program</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Household Members Income Exceeds Household Income (e.g. user forgot to select calculate)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Income Less Than Member Income Total</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rent</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Errors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Rent Level is Required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Tenant Rent Portion is Required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Rent Level is Not Valid for the Funding Program</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Allowable Rent Exceeded</td>
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<td></td>
</tr>
<tr>
<td>• Warnings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Tenant Rent Portion is Zero</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rental Assistance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Errors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Rental Assistance Amount is Required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Rental Assistance Source is Required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Rental Assistance Type is Required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Rental Assistance Type is Required when Amount is Greater than Zero</td>
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</tr>
<tr>
<td>Student</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Errors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Student Count is Required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Student Household Status is Not Indicated</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Student Explanation is Required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ All Student Household, Student Explanation is Required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>◦ Students Listed Exceeds Student Count</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Tenant Information

- **Errors**
  - Member With Special Needs, Household Needs Not Selected
  - Special Needs is Required
  - HH Member Count Must be Greater than 0
  - Head of Household Required With Last Name
  - There can Only be One Head of Household
  - There can Only be One Adult Co-Tenant
  - Household Members Listed Exceeds Member Count
  - All Members Must Have Relationship to Head of Household Entered
  - All Members Must Have a Last Name Entered
  - Household Special Needs Selected, Member with Special Needs Not Selected
  - Household Count Does Not Match Member Count

## Utility Allowance

- **Errors**
  - Utility Allowance is Required
  - Utility Allowance Not Selected

- **Warnings**
  - A More Current Utility Allowance is Available - Utility Allowance is Zero (e.g. user did not enter a current utility allowance in the data base.)
  - Allowance Amount is Not Equal to the Selected Utility Allowance

---

**Step 21: Re-Select**  Update after making the corrections

*** Notice it now lists the TIC in the Side Panel with Event Type and Effective Date

---

![Event Details](image)

Move-in TIC Appears.

---

OHIO HOUSING FINANCE AGENCY

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C. Viewing & Printing the Tenant Income Certification (TIC)

Step 22: Select: View TIC

Step 23: View information added to the TIC

- Depending on your internet browser, you will have one of three printing options:
  - Option A: A PDF version of the TIC will automatically open to print
  - Option B: Use the Export to PDF button (floppy disk icon), which will manual open a PDF to print
- The Rent and Income Limits are calculated
All move-in and recertification Tenant Income Certifications used for the Housing Tax Credits (LIHTC) display the max income and max rent limit amount based on the 40-60 or 20-50 set-aside selection made on the 8609s. HERA Special limits are used as needed if they apply to a property.

Option B: Export to PDF
Step 24: After Viewing the TIC

- Select: **Return to Event Details**
- This will take you back to “Event Details” for the selected unit.
D. Other Event Updates
Based on the type of Event selected certain fields will be grayed out and unavailable for editing.

- **Move-In** – move-in of household
  Update Events:
  - **Move-Out** – move-out of household
  - **Recertify** – recertification of Household
  - **Transfer Out** – household is transferring to a different unit (once transferred Event in new unit will say Transfer In)
  - **Composition Update** – addition or removal of non-head of household member
  - **Rent Update** – tenant portion of rent has changed
  - **Student Update** – update to DevCo confirming or changing the student status

  **Note:** Student Update should only be used for HTC units

The steps described in this section cover entering a Student Update in DevCo, and the steps will be similar for all the update type of events

- If a move-in event is missing, you will need to enter it from the original reporting year that the move-in occurred (See Section VII. E. Entering Historic Move-in Events)

**Step 1:** Pick the unit you want to update using the left hand panel

**Step 2:** Select: Add New Event
Step 3: Add the Event Date
• Student Status needs to be updated annually for HTC

Step 4: Choose Student Update from the Event Type dropdown box
• Once you Select the Student Update Event the last certification entered information will appear.

Step 5: Update the Student information if it has changed
• All Student House-Hold drop down: No/Yes
• Student Count
• Student Explanation
  ◦ N/A
  ◦ TANF Assistance
  ◦ Job Training Program
  ◦ Single Parent/Dependent Child
  ◦ Married/joint return
  ◦ Former Foster Child
• Under Add Member: Student Status for each member of the household

Step 6: Select: Update
Note: You should have a signed Student Certification in the file, this Student Update from DevCo does NOT take the place of the Student Certification in the file and does not need to be printed
E. Entering Historic Move-in Events
A Move-in Event must be entered in DevCo online before any other type of event entered for a unit
• If a move-in event is missing from the system you will need to enter it from the original reporting year that the move-in occurred
• For DevCo, those move-ins that must be entered before the current year are considered historic move-ins

Step 1: To access an older reporting year, Select: Return to Property Listings

Step 2: Select: Show All Owner Certifications (includes Historic Reporting Years)
• The list will expand to include previous reporting years.

Step 3: Check that the Status for the needed reporting year states Active
• If it does not say Active, contact the DevCo Helpdesk at https://devco.ohiohome.org/devcoinquiries to activate that year so it can be edited

Step 4: Select: The correct Eff Date (Reporting Year) for the property

Step 5: Select: The unit for which you are adding the historic move-in
• From this previous year, complete steps for adding a move-in event (See Section VII. A. Event Details—Manually Adding TICs)
• If the event details are all grayed out, contact the DevCo Helpdesk at https://devco.ohiohome.org/devcoinquiries to activate that year
• Once finished, you will need to return to the current reporting year to completely any updates on the unit

Note: “Show All Reporting Years” is grayed out until filter for Property Name is used.
SECTION VIII
USING THE DATA IMPORT FUNCTION (XML UPLOAD)
VIII. USING THE DATA IMPORT FUNCTION (XML UPLOAD)

This section is broken down into two sections:

A. Uploading the XML File
B. Completing Update Events

To be used when you have the ability to upload tenant data from Housing Tax Credit (HTC) compliance software, such as Yardi, RealPage, etc.

NOTE: If you are unsure of how your HTC compliance software exports the XML files please contact your software vendor. DevCo uses the latest Schema of the NAHMA XML Interface Version 2.0. Failure to use this version will result in failed upload.

The first three steps should only need to be done when Importing the Events for the first time each year

A. Uploading the XML File

Step 1: Double Check that your Utility Allowances are loaded prior to doing any import
(Refer to Section V for Updating Utility Allowances)
- Once the file is imported you will have a chance to choose the Utility allowance you want for each unit.
- If UAs are not loaded, you will have to go in manually and update them for each unit once the upload is finished.

Step 2: Double Check the BINs, Award Numbers and Project Numbers from your HTC compliance software
- This ensures the information matches identically to the corresponding numbers in DevCo
- Failure to match these items will result in failure of the upload
- To correct this issue you must correct your HTC compliance software to match how OHFA and Ownership designated the BIN’s per your 8609’s for each building

  Recommended Format:
  - No Hyphen in the Award e.g. 020050
  - Hyphen in the Building e.g. OH-02-00040

Step 3: Double Check that your Unit Numbers from your HTC compliance software match identically to the Unit Numbers in DevCo
- Information needs to be identical to what is in the internal system
- Failure to match these items will result in failure of the upload
  (See Sect VI. D. Unit Information Screen for details on Updating Unit Information in DevCo)
- Contact the DevCo Helpdesk at https://devco.ohiohome.org/devcoinquiries if you need assistance correcting the unit names in DevCo

Below is an example of how the information should be formatted:

Online DevCo - Property Details
Step 4: From the Property Details Screen Select: Import Events

Step 5: Import your events for the entire property.
- Do not import building by building or person by person
  - If you already have information uploaded to the system, importing at a lower level than Property will cause you to lose that information already uploaded
- **The files should now include Rent Updates, Student Updates and Composition Updates which should be listed in your compliance software as Interim Recertification (IR).** Note that OHFA is only concerned with IRs which include information that is required for OHFA’s funding programs. The best example of this is the rent change that is happening with most Interims. In the XML file, these IR events will be listed as Adjustments (A). In the final steps of the upload process, the event type in DevCo will be identified for these Interim/Adjustment type events.

Step 6: When the “Import XML File” screen appears click on **Browse** to search your computer for the XML file to import

Step 7: Once you select the file click on **Upload**
- The file will begin its import process which can take a few minutes to complete
- If discrepancies are found, you will be given a list of errors as to why the import could not be completed
- Go back into your **HTC compliance software** and correct the errors listed
Step 8: Resolve Errors

**Common XML Errors for which Owner needs to correct:**

- **Project ID (Not Specified) does not match a Current Award number**
  - **Cause:** Project Number is blank in the XML file
  - **Correction:** Add the Project Number to the XML file
- **Project ID (OH-02-0056) Does Not Match a Current Award Number**
  - **Cause:** There is no OH in the Project ID number
  - **Correction:** Take out the OH- under Project number in the XML file; 02-0056
- **Project ID (02-0056) Does Not Match a Current Award Number**
  - **Causes:** The letter O was used instead of zero (0) in the project number
  - **Correction:** Changed the O to 0 in the xml file under the Project Number; 02-0056
- **Building ID (OH-02-00567) Does Not Match a Current BIN**
  - **Cause:** Zero (0) was used instead of the letter O in the BIN number
  - **Correction:** Change the 0 to O in the XML file for the BIN number; OH-02-00567
- **Building ID (0200567) Does Not Match a Current BIN**
  - **Cause:** The Building ID is missing the OH
  - **Correction:** Add “OH” to the Building ID number in the XML file; OH-02-00567
- **Unit A01 Does Not Exist in Building OH-02-00567**
  - **Cause:** There is a zero in the unit name
  - **Correction:** Omit the 0 from the unit name in the XML file to match the unit name in the DevCo system; A1
- **Unit 103 Does Not Exist in building OH-12-00567**
  - **Cause:** Building ID number and units under it are incorrect
  - **Correction:** Correct the Building ID number in the XML file to correspond with the unit numbers
- **Unit 123 Does Not Exist in Building OH-12-00567**
  - **Cause:** The BIN numbers are in the wrong spot in the XML file
  - **Correction:** Add the correct BIN number that corresponds with the units
- **The (IC) Event is Not Valid for Unit (103) because it is Vacant**
  - **Cause:** IC (Initial Certification) is not an event in our system
  - **Correction:** Change the Event date to MI (Move in) in the XML file

**XML Errors for which OHFA needs to assist**

If you receive these errors contact the DevCo Helpdesk at https://devco.ohiohome.org/devcoinquiries with the needed information. These errors pertain to data discrepancies between the XML files and DevCo.

- **The “R” (Recert) Event is Not Valid For Unit (103) Because it is Vacant or Occupied**
  - **Cause:** Our system has that unit marked as Vacant.
  - **Correction:**
    - **Owner:** needs to copy the error and send it to OHFA
    - **OHFA:** will correct the statuses based on the error page changing them from Vacant to Occupied, or vice versa
- **Unit 10 Does Not Exist in Building OH-12-00567**
  - **Cause:** There is a discrepancy as to what is in the XML and in our system
  - **Correction:**
    - **Owner:** needs to verify that Unit 10 is in OH-12-00567, and alert OHFA if it needs to be corrected
    - **OHFA:** updates the system based on the verification
- **Building ID (OH-12-00123) Does Not Match a Current BIN**
  - **Owner:** Confirm information with OHFA
  - **OHFA:** Checks if the BINs are added correctly in DevCo
- **Any other errors not listed**
Step 9: Select the Utility Allowance for each Unit

- If upload was successful and data was accepted, the Utility Allowance Confirmation screen will appear.
- You will need to select the correct Utility Allowance for each unit.
  - The appropriately dated Description is what appears in the dropdown box below. Therefore, a detailed description would be beneficial.

![Utility Allowance Table]

Recommended UA Description Format Examples:
- 2 bdrm garden PHA 1/1/14
- 2 bdrm townhome PHA 1/1/14

Note: If you have a property with more than 100 units, you should skip identifying the UAs until after the XML upload has been successfully uploaded in DevCo.

Step 10: Select: Save

**NOTE:** There could be varying years associated with each unit depending on the date of the event. The example below shows the importance of the description; adding the date helps differentiate. (See Section V. Adding Utility Allowance(s) to a Project for more information on modify UA descriptions.)

![Utility Allowance Table]

Step 11: Select: Done

- If the XML upload was successful, you will see “Successfully saved XML data.”
- Select: Done to complete the process.
Optional Step: If you haven’t identified the utility allowances on the units during the Upload Process you will need to do that now.

- Use the panel on the left to navigate through the units and events, and click on the event
- Select on the Event Details page the utility allowance from the dropdown and click update at the bottom of the page.

Note: You need to identify the UAs on each event.

---

### B. Completing Update Events this is a new step to the XML upload process.

**Step 12: Export Events to identify units with Update events listed on them.**

- Click Export Events on right of the Property Details screen.
- Below the table of events click Export Events again to open in Microsoft Excel
- Depending on where you looking at these events will be given different labels.
- The Property Management software (Yardi/ Real Page) use Interim Recerts (IR)
- XML calls them Adjustments (A)
- DevCo initially lists them as Composition Updates (CU). They must be updated to the appropriate Update - Rent, Student and Composition

**Step 13: Filter Events by Event Type Code**

- Apply a filter in excel and select events marked CU (composition update)
- Alternatively print the list and review on paper

**Step 14: Adjust Update Events**

- Using list of events marked CU make the needed updates in DevCo to the Event Type listed for each of these events.
- On the Event Details page open the dropdown and select the correct event type either Student Update, Rent Update, or leave it as Composition Update.
- Click Update at the bottom of the page and the event should now be listed on the left with the correct event type.

Note: It is important to identify which update it is because there are different compliance checks that are run in the background on each event type. OHFA recommends using the export feature a final time to check that all events are listed correctly.

- After this is completed on all the update events you are now finished with your update to DevCo using the XML upload process.
SECTION IX

FINALIZE YEAR - (SUBMIT TENANT EVENTS)
IX. FINALIZE YEAR – (SUBMIT TENANT EVENTS)

Once you have all of your tenant, unit and building certification information loaded, you are ready to finalize for that certification year.

**Note:** Finalize Year function should only be done at the end of the reporting year

- After you finalize your tenant events, you CANNOT go back and change any information from that year
- If a change is necessary contact the DevCo Helpdesk at [https://devco.ohiohome.org/devcoinquiries](https://devco.ohiohome.org/devcoinquiries) for this project

**Step 1:** Review your report of Tenant Events; Select: Export Events from the Property Details Screen

- Double check if all the events for the reporting year are listed
- If a unit is not listed, this means there is not a tenant event recorded in DevCo for that reporting year and will need to be entered
- **Tenant events must be added chronologically**

- To transfer data to a spreadsheet select Export Events at bottom of Export Events screen
  - This will open a file in Excel that can easily be reviewed and filtered

**Step 2:** Select: Return to Property Details
Step 3: Resolve issues listed
- You may either have errors or warnings listed
- You CANNOT proceed without resolving the errors
- In this example, only Warnings appear therefore, we can proceed to Finalize.
  - Errors must be corrected for Finalize Year to work
  (See Section VII B. Compliance Checks – Errors and Warnings for more information)

<table>
<thead>
<tr>
<th>Finalize Errors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh Error List</td>
</tr>
<tr>
<td>Building</td>
</tr>
<tr>
<td>OH-88-02000</td>
</tr>
<tr>
<td>OH-88-20000</td>
</tr>
</tbody>
</table>

Step 4: Select: Finalize Year
- When clicking Finalize Year the status will switch to Property Review

Step 5: Select: Start Finalization

Start Finalization Process

This will start the finalization process for your annual owner certification. This process will allow you to review any existing compliance issues that have been identified. If there are any issues, you will be allowed to make modifications which will be recorded for the submission. After reviewing the certification, you will be able to complete the finalization process. Once the certification is finalized, you will have the ability to print a record and you will no longer be able to edit this certification.
Step 6: Review remaining issues listed
- You may either have errors or warnings listed
- You CANNOT proceed without resolving the errors
- In this example, only Warnings appear therefore, we can proceed to Finalize.
  - Errors must be corrected for Finalize Year to work
(See Section VII B. Compliance Checks – Errors and Warnings for more information)

![Finalize Errors table]

Step 7: After you resolve the errors, you will have to go back through the Finalize Year process:

Step 8: Select: Refresh Error List
- The Warnings will be listed; these will not hinder the project being finalized

Step 9: Select: Proceed to Finalize

Step 10: Select: Finalize

Step 11: A Receipt for the tenant events submission will be ready for you to Print
- This should be kept as a record of when tenant data was submitted initially, if the property is made active after the Deadline this impacts the submission date when the property is re-finalized

![Annual Tenant Data Submission Receipt]

Step 12: Select: Return to Property Details
- Note: After the tenant events for the reporting year have been finalized the buttons will change; instead of Finalize Year there is a Receipt button

![Property Details]

Step 13: You can view your Report by Selecting: Export Events from the Property Details Screen
Step 14: For your records you may want to Export Events which puts the information in an Excel Spreadsheet

- If a unit is not listed this means there is not a tenant event in DevCo for that reporting year and it should have been entered
- **Note:** to print the report of events from DevCo, it is best to export and print from Excel by clicking on Export Events at the bottom of the screen

![Export Events](image)

Step 15: Notice now in the Properties Listing the Status changes from Active to Finalized

- Once the property is finalized, the OHFA Program Compliance Analyst will receive an email stating the Property Name and who finalized it. The email is dated the day the Finalization occurred.
- **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 and is partially locked (contact DevCo Helpdesk to unlock)
  - **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

![Properties Listing](image)
SECTION X
ANNUAL CERTIFICATION
X. ANNUAL CERTIFICATION

Step 1: Select the appropriate reporting year from the Property Listing screen.
   e.g., 2014 reporting year select the 2014 effective date

Step 2: Select: Annual Certification

Step 3: Review each section of the Property General Information Screen

Step 4: Answer the question for each section: e.g. Project Information is up to date
   - From the drop down Choose “Yes” or “No”
     - If the information is not up to date then choose “No”
     - A text box, “If not, specify the project changes”, will appear. Indicate the needed changes. (see example where address changed)

Step 5: Select: Save
   - As you complete the certification, clicking on either Save or Next will capture the changes. You can return to the page at a later date. If you do not click on either of those two buttons you will lose your changes.
“No” - a text box will appear to add in updates needed.

“Yes” - tells us this is correct information and you have verified it.

Note: Qualified Unit identified count is based on units program units. See Section VI. D. Unit Information.
Step 6: Select: Next to go to the Annual Certification screen

Step 7: Select the applicable certification type(s) using the dropdown below

- To select more than one certification type, press and hold the Ctrl key and click each Certification type to highlight them. If more than one certification type applies to the properties they must both be selected and submitted.
  - "Gap Financing" must be submitted for projects financed with HDAP, HOME, OHTF, FAF, NSP, TCE, or TCAP.
  - "Tax Credit" must be submitted for projects financed with 9% Housing Tax Credits or 4% Housing Tax Credits with multifamily bonds.
  - "Extended Use" must be submitted for projects financed with 9% Housing Tax Credits or 4% Housing Tax Credits with multifamily bonds that are in their 15 year extended use period. If these projects have HDAP funding, GAP Financing questions need to be completed as well.

NOTE: No project can submit both a Tax Credit Annual Certification and an Extended Use Annual Certification

Step 8: Click: Load. The certification questions should appear

Step 9: Fill out the questions

- Note: If a needed certification type is not selected or highlighted
  - Click Save for any answered questions, then click on Reset and select the required certification(s)
  - Select: Load. The missing questions should appear

- For questions requiring an explanation, a text box will appear to the right requiring the explanation. The user cannot move to the next page without filling in the text boxes with appropriate responses.
Step 10: **Select: Save**
- As you complete the certification, clicking on either **Save** or **Next** will capture the changes. You can return to the page at a later date. If you do not click on either of those two buttons you will lose your changes.

Step 11: **Select: Next to go to the Annual Certification screen**

Step 12: **Fill out your credentials**
- This information will serve as an electronic signature confirming the Certification is submitted by a person with authority to act on behalf of the owner
  - Name
  - Title
  - Company
  - Email Address
  - Direct Telephone Number
Step 13: Select: Submit

- If you need to send additional information, a reminder appears depending how you answered the certification questions:
  - Owner-Manager change Notification
  - Letter of findings or discrimination from the adjudicating agency or court
  - Copy of the building code or health/safety citation

Step 14: Select: Print for your Records

- Clicking Print provides a summary of the three pages included in the Annual Certification
  - Note: If you have returned to Annual Certification to print make sure you select all applicable certification types on the Annual Certification screen, otherwise you will have an incomplete set of questions.
Step 15: Select: Close

- This will take you back to Property Details
- Once you submit your Certification, you cannot make changes.
- If you return to the Annual Certification screens a red time stamp will appear on all screens
  - The message indicates that your Certification was submitted successfully
  - Date and Time of submission is recorded
  - Anything you update after submission will not be saved
  - If a correction is needed contact the DevCo Helpdesk at https://devco.ohiohome.org/devcoinquiries
    - In the form:
      - Give the project number
      - Project Name
      - Explain why corrections are needed

Submit Annual Certification

Changes will not be saved. This was submitted on 9/25/2015 2:46:41 PM

![Submit Annual Certification form]

Add additional documents required will appear after the submission is complete.

*Fill out and email the Owner-Manager Change Notification found on the OHFA website.
*Email a copy of the Violation Report and any documentation of correction.