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# Property Online Reporting Tool (PORT)

User Guide

Last Updated: December 2025

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*An equal opportunity employer.*

*This information will be made available in alternative format upon request.*

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## Foreword

The Property Online Reporting Tool (PORT) is Minnesota Housing's compliance monitoring system. It allows Minnesota Housing to collect and analyze data and annual owner certifications on properties it has financed with state and federal resources.

Property, loan, and housing tax credit data, including the associated income and rent restrictions, are brought together with unit and household data reported by the owner; income eligibility and tenant-paid rent are referenced by compliance monitoring tables of income and rent limits. Noncompliance noted during Minnesota Housing's monitoring reviews, including inspections, is available to owners online.

## Terms and Conditions

As a condition of your use of the Minnesota Housing website, you are entering into an agreement with Minnesota Housing that you will not use the Minnesota Housing website for any purpose that is unlawful or prohibited by these terms, conditions, and notices.

You may not use the Minnesota Housing website in any manner which could damage, disable, overburden, or impair the Minnesota Housing website or interfere with any other party's use of the Minnesota Housing website site.

You may not modify copy, distribute, transmit, display, perform, reproduce, publish, license, create derivative works from, transfer, or sell any information obtained from the Minnesota Housing website.

Users of the Minnesota Housing website are responsible for checking the accuracy, completeness, currency and/or suitability of all information. Minnesota Housing makes no representations, guarantees, or warranties as to the accuracy, completeness, currency, or suitability of the information provided via this web site.

In addition, certain information in Minnesota Housing's Property Online Reporting Tool (PORT) is protected by the Minnesota Government Data Practices Act, MN Statutes Chapter 13.

If any information is incorrect, missing, or incomplete, it is the owner's responsibility to inform Minnesota Housing of the error.

PORT is an online reporting tool. Minnesota Housing does not represent or guarantee that using PORT will prevent an owner from violating the terms and conditions of its loan and/or tax credit allocation agreements.

Any failure by Minnesota Housing to monitor a specific loan or restriction in PORT does not release or absolve an owner from the legal obligations under its loan or allocation agreements. If Minnesota Housing discovers that data in PORT is incomplete or inaccurate, it will make corrections and notify the owner.

To provide security against unauthorized viewing or manipulation of property data, Minnesota Housing will assign one PORT username and password to the Owner of each property (for an exception, refer to Chapter 6, below, for designation of an Owner's Account Administrator). The Owner is responsible for controlling who is authorized to access its properties in PORT. Owner may designate one Management Account and that Management Account may designate one Site Management Account. All reporting submitted by an Owner's authorized Management Account or its designated Site Management Account will be deemed by Minnesota Housing to have been submitted by the Owner.

In addition, it is the Owner's responsibility to deny management access when necessary due to changes in management agent and/or staffing. Refer to Chapter 8 for instructions on how to deny access to a Management or Site Management Account.

## Funding Sources Monitored and Reporting Requirements

The Property Online Reporting Tool (PORT) is used by Minnesota Housing for compliance reporting and monitoring of these funding sources:

*Table 1: Funding Sources Monitored in PORT*

PORT Name	Program Name
501c3	501c3 bond program
ARIF	Affordable Rental Investment Fund
AMF	Asset Management Fund
EDHC	Economic Development Housing Challenge (also referred to as “Challenge”)
ELHIF	Ending Long Term Homelessness Initiative Fund
ERA2 <sup>1</sup>	Emergency Rental Assistance Program (capital funds)
FARIF	Flood Affordable Rental Investment Fund
HOME <sup>1</sup>	HOME Investment Partnership Act
HOPWA <sup>1</sup>	Housing Opportunities for Persons with Aids
HTC Allocation	Low Income Housing Tax Credit Program (aka Section 42)
HTF	Housing Trust Fund
HTF-LTH	Housing Trust Fund – Long Term Homeless
HTFT	Housing Trust Fund Transitional
HIB	Housing Infrastructure Bonds or Appropriations
IIH	Innovative and Inclusionary Housing Program
LILF	Low Income Large Family
MARIF	Minnesota Affordable Rental Investment Fund
NHTF <sup>1</sup>	National Housing Trust Fund
PARIF	Preservation Affordable Rental Investment Fund
POHP <sup>2</sup>	Publicly Owned Housing Program (previously named POPR)
POPSHP <sup>2</sup>	Publicly Owned Permanent Supportive Housing Program
POTH <sup>2</sup>	Publicly Owned Transitional Housing
RRDL	Rental Rehabilitation Deferred Loan Program
SHTC	State Housing Tax Credit Program

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<sup>1</sup> Federal funds either from HUD or Dept of Treasury

<sup>2</sup> Funded with General Obligation (GO) bonds or state appropriations

PORT Name	Program Name
SN	Special Needs Housing Program
Section 1602 <sup>1</sup>	Section 1602, sometimes referred to as Tax Credit Exchange Program
TCAP <sup>1</sup>	Tax Credit Assistance Program
TIHP	Tribal Indian Housing Program
TL	Transitional Housing Program
UIHP	Urban Indian Housing Program

**Reporting Requirements:** The following describes the annual submission requirements that apply to the various funding sources noted above. Most properties need to submit multiple items.

*Table 2: Annual Submission Requirements*

Funding Source	Required Items	Notes
All properties subject to monitoring in PORT	<p>Report all occupancy-related events for each unit in the property.</p> <p>Beginning with CY2026 reporting (due February 2027), tax credit properties that are in the EUP and monitored for federal programs such as USDA Rural Development and Project-Based Section 8 must resume occupancy reporting in PORT.</p> <p>Tax credit properties that are in the three-year protection period following termination or expiration of the Extended Use Period (EUP) and have no other agency financing are <b>only required to report unit events on protected households</b>.</p>	<p>Exempt from reporting occupancy-related events:</p> <ul style="list-style-type: none"> <li>Section 8 properties financed with a Minnesota Housing deferred loan that report to Minnesota Housing via TRACS <b>unless</b> 1) the deferred loan restricts more units than those covered by the Section 8 contract, or 2) the property was also financed with HOME or NHTF funds from Minnesota Housing and the property is still in its affordability period, and/or is monitored for housing tax credit compliance by Minnesota Housing.</li> </ul>
<p>One or more of the following sources:</p> <ul style="list-style-type: none"> <li>Minnesota Housing deferred loan</li> <li>HOME</li> <li>National Housing Trust Fund</li> </ul>	Deferred Loan Annual Owner Certification.	Properties <b>also</b> financed with an amortizing first mortgage from Minnesota Housing will not be required to complete an owner certification for compliance with a Minnesota Housing deferred loan <b>unless</b> the property was also financed with HOME or National Housing Trust Funds.
Housing Tax Credits (including those with a tax	Owner Certification of Continuing Program Compliance.	8609(s) only need to be sent to Minnesota Housing once, for the first tax



Funding Source	Required Items	Notes
credit carryover allocation or a preliminary determination letter that have not yet established the first credit year)	<p>First year 8609(s) with Part II completed (include the attachment for multiple building election if applicable).</p> <p>Beginning with CY2026 reporting (due February 2027), tax credit properties that are in the EUP and monitored for federal programs such as USDA Rural Development and Project-Based Section 8 must complete the owner certification for projects in the extended use period.</p>	<p>credit year, and can be scanned and emailed to the assigned compliance officer.</p> <p>Housing Tax Credit properties in year 1 and later must also complete the Applicable Fraction Certification.</p> <p>Housing Tax Credit properties electing the Average Income Test in year 1 and later must also complete the Average Income Test Certification indicating the year-end unit designation for each project by unit size and income and rent limit tier. PORT will calculate the imputed average for each project. Owners must complete the single or multiple-building election in the BIN pages of PORT before they can complete the Average Income Test Certification.</p>

## Chapter 1 – Login and Username

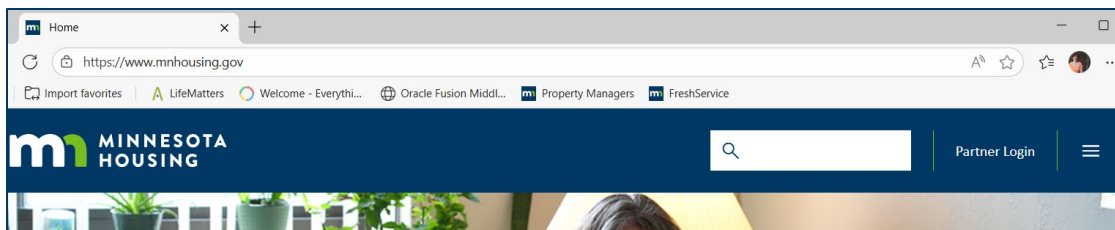
The following is required for online reporting: Email, Personal computer, internet connection, and Chrome, Firefox or Microsoft Edge web browser.

Minnesota Housing will assign a PORT username only to the legal owner of each property. The username and temporary password will be assigned after loan closing or, for tax credit properties after the Carryover Allocation Agreement is executed or after the Preliminary Determination letter is issued for 4% deals. Logon credentials and instructions will be sent via email to the owner's designated contact.

To log in:

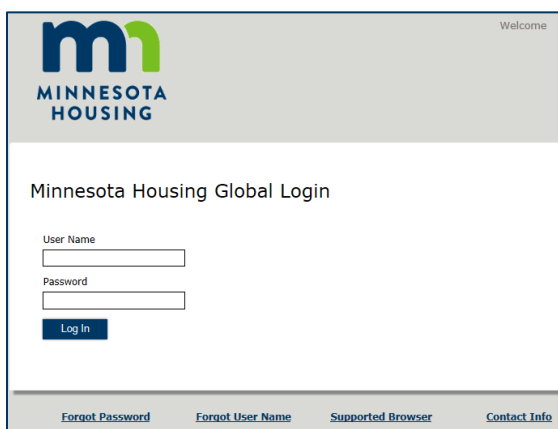
1. At <https://www.mnhousing.gov/>, click the **PARTNER LOGIN** link in the upper, right-hand corner.

*Figure 1: Location of Partner Login*



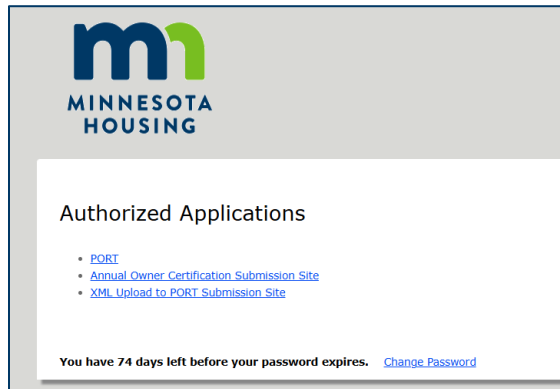
2. Under the heading, "Rental Housing Information," click to cascade the options for "Property Online Reporting Tool (PORT)," and click the PORT link. Tip: Add this to your web bookmarks for easier navigation for future reporting.
3. On the **Global Login** page, log in using your assigned PORT username and password.

*Figure 2: Login Screen*



4. At first login, users will be prompted to set a password. Passwords must be 9 digits long and contain at least one capital letter, one number, and one special character (comma, asterisk, ampersand, dollar sign, pound sign, etc.). Passwords expire every 90 days.
5. Click the **PORT** link below the title **Authorized Applications**.

Figure 3: PORT Link



6. Click the **Terms of Use** link, read the Terms and Conditions carefully, and then click the back arrow. Agree to the Terms of Use by clicking the **Agree** box. If you click Not Agree, you will be navigated back to the login page.

Figure 4: Terms and Condition of Use

7. If you clicked on the Agree box, you will be directed to the User Home page. If you have access to multiple properties, simply click any of the properties' link to navigate to that property's information.
8. From any tab or detail screen, click >>User Home>> to navigate to the User Home page.
9. In certain detail screens, the property tabs no longer appear. Navigate back to the property and its associated tabs by clicking >>Property>> at the top of the screen.

Do not log in to PORT multiple times for different properties from the same computer using multiple browser windows. Doing so will cause data to display incorrectly.

**Forgot password:** If you forget your password, click the Forgot Password link and you will be asked to supply your username and email address. A new password will be emailed to you. Change your password upon your next login. If the forgot password function does not recognize your username or email address, contact your assigned compliance officer. If you do not receive the email with the temporary password, check your spam or junk folder or talk to your IT technicians to make sure your email filtering allows system-generated email to be received.

**Locked account:** After three unsuccessful login attempts, PORT will lock the account. Only the authorized user may request to have an account unlocked; contact your assigned compliance officer.

**For entities that have ownership interest in multiple properties:** See Chapter 6 for instructions on assigning an Owner's Account Administrator (OAA). The OAA role is only available when the same entity has ownership interest in multiple properties. For example, ABC Company is a partner in Best Apartments Limited Partnership that owns Best Apartments, and ABC Company is also a member in Awesome Apartments LLC that owns Awesome Apartments. ABC Company can submit an OAA designation form to request ABC Company to be the OAA for both properties with Mary Smith as the OAA contact.

The OAA is not for granting access to management agents. See Chapter 7 for instructions on setting up a management and site management account to allow management staff access. Minnesota Housing cannot authorize management accounts.

## Chapter 2 – Property Information

### 2.01 Property Tab

The **Property** tab is a dashboard of basic property information and links to other details about the property, including the assigned Minnesota Housing staff. Help Minnesota Housing maintain correct and complete information by notifying the assigned compliance officer if any information is not correct or not complete.

Figure 5: Property Tab

User Home » Property »

**D9999: Best Apartments**

Property Buildings/Units Owner Reporting Violations Restrictions Loans/HTC Admin

Property Number: D9999

Name: Best Apartments

Address1: 123 Main Street

Address2: \_\_\_\_\_

City: Saint Paul Zip Code: 55101

County: Ramsey Year Built: 2011

Region: MHIG E. D. Region: 11

No of Buildings: 1 Total Number of Units: 50

Units by Size

1 BR	1
2 BR	1
3 BR	1
Studio	67

1 unit(s) currently out of service.

Property Type

- ☐ Green property
- ☐ Supportive housing
- ☐ Emergency shelter
- ☐ Group home
- ☐ Transitional housing

Population Served

- ☐ Elderly
- ☐ Family
- ☒ Special needs

Other Influences

- ☐ Holman
- ☐ HPH operating subsidy
- ☐ HPH rental assistance
- ☐ HPHA first mortgage
- ☐ TGA
- ☐ PBGA
- ☐ Supportive services
- ☐ HUD risk share
- ☐ Tax credit sub allocators
- ☐ Rural development
- ☐ Tax exempt bond
- ☐ Non-MHFA HUD Program

Current HTC/Deferred Loans: BLMF, HOME, HTC, HTC

Property Lease Up Date: 04/24/2001 [Change](#)

[Name History](#) [Property Entities](#) [Assigned Staff](#) [Report change in entity](#) [HTC Monitoring fees](#)

Total Uncorrected Violations for this property: 2

**Property Owner**

Best Owner Ever LP

222 Main St

Saint Paul, MN 55101

Phone: (651) 555-1111

[View TIN](#)

**Management Company**

Awesome Management Co

222 Main St

Saint Paul, MN 55101

Lena Anderson

Phone: (651) 222-3333

**Site Manager**

No site manager set up for this property




[Set Up Site Manager](#)

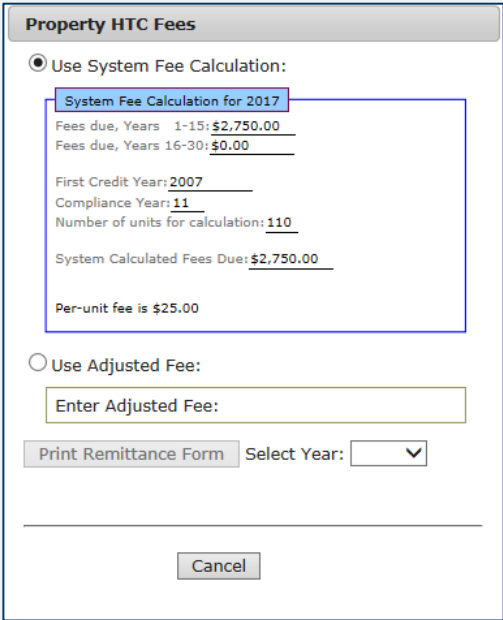
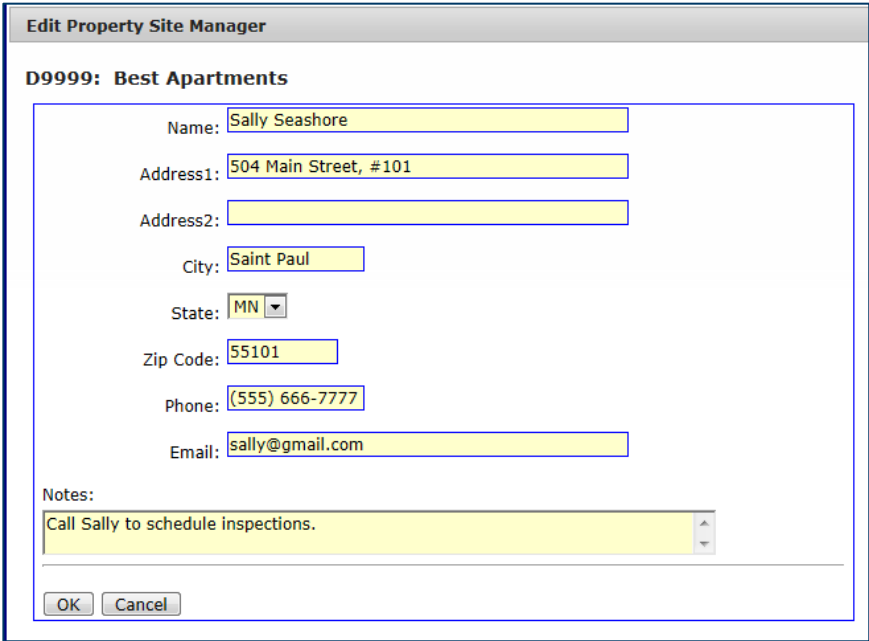
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Click the available hyperlinks to see details for:

Table 3: Hyperlinks and Associated Information in Property Tab

Hyperlink	Information Presented
Name History	Previous property names
Property Entities	Current and previous owner, manager, partner and other entities associated with the property.  Minnesota Housing retains owner and management company history. These will be noted as “Previous Project Owner” or “Previous Management Company.”

Hyperlink	Information Presented																																																																
	<p>Figure 6: Property Entities</p> <div><p>Property Number:<u>D9999</u></p><p>Property Name:<u>Best Apartments</u></p><table><tr><th colspan="8">Property Entities</th></tr><tr><th>Name</th><th>Type</th><th>Address</th><th>City</th><th>ST</th><th>Zip Code</th><th>E-Mail</th><th>Phone Nbr</th></tr><tr><td>Awesome Management Co</td><td>Management Company</td><td>222 Main Street</td><td>Saint Paul</td><td>MN</td><td>55101</td><td></td><td>6513334444</td></tr><tr><td>Best Owner Ever LP</td><td>Project Owner</td><td>555 Main Street</td><td>Saint Paul</td><td>MN</td><td>55101</td><td>bestowner@gmail.com</td><td>6512223333</td></tr><tr><td>Lena Anderson</td><td>Management Company Contact</td><td>222 Main Street</td><td>Saint Paul</td><td>MN</td><td>55101</td><td>lena@gmail.com</td><td>6513334444</td></tr><tr><td>Ole Johnson</td><td>Project Owner Contact</td><td>555 Main Street</td><td>Saint Paul</td><td>MN</td><td>55101</td><td>ole@gmail.com</td><td>6512223333</td></tr><tr><td>Ole Johnson</td><td>General Partner</td><td>555 Main Street</td><td>Saint Paul</td><td>MN</td><td>55101</td><td>ole@gmail.com</td><td>6512223333</td></tr><tr><td>Sven Nelson</td><td>General Partner</td><td>333 Main Street</td><td>Saint Paul</td><td>MN</td><td>55101</td><td>sven@gmail.com</td><td>6515551111</td></tr></table></div>	Property Entities								Name	Type	Address	City	ST	Zip Code	E-Mail	Phone Nbr	Awesome Management Co	Management Company	222 Main Street	Saint Paul	MN	55101		6513334444	Best Owner Ever LP	Project Owner	555 Main Street	Saint Paul	MN	55101	bestowner@gmail.com	6512223333	Lena Anderson	Management Company Contact	222 Main Street	Saint Paul	MN	55101	lena@gmail.com	6513334444	Ole Johnson	Project Owner Contact	555 Main Street	Saint Paul	MN	55101	ole@gmail.com	6512223333	Ole Johnson	General Partner	555 Main Street	Saint Paul	MN	55101	ole@gmail.com	6512223333	Sven Nelson	General Partner	333 Main Street	Saint Paul	MN	55101	sven@gmail.com	6515551111
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Sven Nelson	General Partner	333 Main Street	Saint Paul	MN	55101	sven@gmail.com	6515551111																																																										
Assigned Staff	<p>Minnesota Housing’s assigned staff and their role</p> <p>Figure 7: Property Entities</p> <div><p><b>Assigned Staff</b></p><p>Property Number:<u>D9999</u></p><p>Property Name:<u>Best Apartments</u></p><table><tr><th colspan="3">Assigned Staff</th></tr><tr><th>Role</th><th>Name</th><th>UserName</th></tr><tr><td>Voucher Specialist</td><td>Pam Hayes</td><td>PHAYES</td></tr><tr><td>TRACS Specialist</td><td>Pam Hayes</td><td>PHAYES</td></tr><tr><td>Section 8 Voucher</td><td>Pam Hayes</td><td>PHAYES</td></tr><tr><td>Previous HMO</td><td>John Madson</td><td>JMADSON</td></tr><tr><td>Occupancy Specialist</td><td>Pam Hayes</td><td>PHAYES</td></tr><tr><td>HMO</td><td>Tom Pearson</td><td>TPEARSON</td></tr><tr><td>HDO</td><td>Wendy Bednar</td><td>WBEDNAR</td></tr><tr><td>Compliance Officer</td><td>Monica Garcia</td><td>MGARCIA</td></tr></table><div><div>10</div><div></div><div>Page 1 of 2</div><div></div><div>Displaying 1 to 8 of 9 items</div></div></div>	Assigned Staff			Role	Name	UserName	Voucher Specialist	Pam Hayes	PHAYES	TRACS Specialist	Pam Hayes	PHAYES	Section 8 Voucher	Pam Hayes	PHAYES	Previous HMO	John Madson	JMADSON	Occupancy Specialist	Pam Hayes	PHAYES	HMO	Tom Pearson	TPEARSON	HDO	Wendy Bednar	WBEDNAR	Compliance Officer	Monica Garcia	MGARCIA																																		
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HDO	Wendy Bednar	WBEDNAR																																																															
Compliance Officer	Monica Garcia	MGARCIA																																																															
Report Change in Entity	<p>Generates an email to notify the compliance officer of any change of information for any of the Property Entities. Include a Change in <a href="#">Change Property Name or Owner/Management Contact Information Change Form</a> for changes in owner contact or management contact. Other kinds of changes, including property sale, refinance, etc., require a <a href="#">Request for Action</a>.</p>																																																																
HTC Monitoring Fees	<p>For tax credit properties only, this displays the required annual tax credit monitoring fee and generates the Fee Remittance Form. Compliance fees are not due until the owner establishes the first credit year. Until the first credit year is known, the system calculates the compliance period based on the year of allocation. Once the first credit year is entered in the BIN pages, the compliance years will be readjusted.</p> <p>To generate the Fee Remittance Form, select the year for which fees are being paid. This will activate the Print Remittance Form button. Click the button and a PDF of the Fee Remittance Form will be available for printing. Submit this with your annual monitoring fee payment.</p>																																																																

Hyperlink	Information Presented
	<p><i>Figure 8: HTC Monitoring Fee Remittance</i></p> 
Site Manager	<p>Click the <b>Set Up Site Manager</b> link to add or edit the current site manager. It is the owner/manager's responsibility to keep site manager information current. If there is no site manager, simply leave it blank.</p> <p><i>Figure 9: Edit Property Site Manager</i></p> 
View TIN	<p>This is the Taxpayer Identification Number (TIN) for the legal owner of the property and is required for tax credit properties. This is not available for view by Management or Site Management Accounts. If the TIN is not correct, notify your</p>

Hyperlink	Information Presented
	assigned compliance officer. If it is blank, the compliance officer will notify the owner if this number is needed.

The boxes under Property Type, Population Served, and Other Influences have been checked if the following conditions are known to the compliance officer.

*Table 4: Property Type*

Property Type	Condition
Green Property	The property was funded with a Green Initiative or priority.
Supportive Housing	The property provides supportive housing.
Emergency Shelter	The property operates as an emergency shelter, not permanent or transitional housing.
Group Home	The property operates as a group home.
Transitional Housing	The housing's occupancy is limited to 24 months.

*Table 5: Population Served*

Population Served	Condition
Elderly	The property is age restricted serving households with at least one member aged 55 and over.
Family	The property is not age restricted.
Special Needs	The property serves households with special needs.

*Table 6: Other Influences*

Other Influences	Condition
Hollman	One or more units receive assistance under the Hollman consent decree.
HPH operating subsidy	The property currently receives a Minnesota Housing HPH operating subsidy (contact the assigned compliance officer to uncheck this box if the operating subsidy expires and is not renewed).
HPH rental assistance	The property currently receives Minnesota Housing HPH rental assistance (contact the assigned compliance officer to uncheck this box if the rental assistance contract expired and is not renewed).
MHFA first mortgage	The property has a Minnesota Housing amortizing first mortgage or other loan that requires asset management oversight (e.g., LMIR, NCTC, Repayable HIB or HIA, etc.).
TCA	The property has a Section 8 contract with Traditional Contract Administration. Minnesota Housing no longer has any TCA in its portfolio.
PBCA	The property has a Section 8 contract with Performance Based Contract Administration.



Other Influences	Condition
Supportive services	The property provides supportive services on site.
HUD risk share	The property was financed with a Minnesota Housing loan that has mortgage insurance through HUD's Risk Sharing Program.
Tax credit sub allocator	The property has tax credits and/or Section 1602 allocated/awarded and monitored by a sub-allocator.
Rural Development	The property is financed by USDA Rural Development.
Tax exempt bond	The property is financed using tax exempt bonds (Minnesota Housing or other issuer).
Non-MHFA HUD program	The property has Section 8 or other HUD program not subject to Minnesota Housing contract administration and is subject to inspections by HUD.
811 Rental Assistance	Property has a HUD Section 811 contract

## 2.02 Building(s)

The **Building/Units** tab is where units will be set up and occupancy reporting will be done. Confirm that the correct number of buildings appears for the property and that Building Identification Numbers (BIN) and addresses are correct (BINs are only applicable for tax credit properties). Notify the compliance officer if any information is incorrect.

Figure 10: Building/Units Tab

The screenshot shows a web application interface. At the top, there is a breadcrumb trail: "User Home >> Property >>". To the right of this, the text "D9999: BestApartments" is displayed. Below the breadcrumb, there is a horizontal menu with several tabs: "Property", "Buildings/Units" (which is highlighted in blue), "Owner Reporting", "Violations", "Restrictions", "Loan/HTC", and "Admin". Under the "Buildings/Units" tab, there is a list of four entries, each consisting of a building identification number followed by an address: "MN-99-99991: 210 Main Street E", "MN-99-99992: 504 Main Street E", "MN-99-99993: 616 Main Street E", and "MN-99-99994: 204 Main Street E". Each entry is underlined, suggesting it is a clickable link.

## 2.03 Units

1. The owner or its authorized Management Account or designated Site Management Account must set up all units in each respective building for the property. This includes any units being used as on-site employee units or unit used as a site office or tenant facility. Click the **Building** link.
2. Above the Building Units section toward the middle of the page, click the **Setup Unit** link. This will open the Unit Data screen.

Figure 11: Link to Setup Unit

User Home » Property » Building »

**D9999 Building: 210 Main Street E**

Building Number: MN-99-99991

Building Name: 210 Main Street E

Address1: 210 Main Street E

Address2: \_\_\_\_\_

City: Saint Paul Zip Code: 55101

Units Setup: 23 **Setup Unit**

Use for Housing Tax Credit Buildings

Applicable Fraction Calculator

Required Applicable Fraction: 100.00 %

Note - All the units in the building must be set up before calculating applicable fraction.

[Print Building Map](#)

3. Enter the assigned Unit Number, Bedroom Type (number of bedrooms), and Total Square footage for each unit in the building. These are required fields as noted by the red asterisks.

Figure 12: Unit Detail

**Add Unit**

Unit Number \*:  Bedroom Type \*:  Total Sq Ft Area \*:

☐ Accessible ☐ Visual Impaired ☐ Hearing Impaired ☐ Special Needs

Notes:

OK Cancel

4. Click one or more checkboxes to indicate if a unit is designed to be handicap accessible (Accessible), contains equipment to accommodate visual impaired persons (Visual Impaired), contains equipment to accommodate hearing impaired persons (Hearing Impaired), and/or is a unit specifically designed for persons with other kinds of special needs (Special Needs). Use the Notes field to explain any additional or unusual features of the unit. Do not use the Notes field to explain any occupancy information.
5. Click the **OK** button to save the unit information.
6. Repeat steps 2-5 until all units for the building are entered. If there is more than one building, repeat for each building.

Once units are set up in PORT and unit events have been reported, the information can only be edited by Minnesota Housing. Contact your assigned compliance officer if unit information needs to be changed.

For instructions on reporting occupancy information, refer to Chapter 3, Reporting Unit Events.

## 2.04 Applicable Fraction Calculator

The Applicable Fraction Calculator is only used for tax credit and Section 1602 properties. Owners must designate how each unit is treated for purposes of calculating the required Applicable Fraction used to determine the building's tax credits for issuance of IRS form 8609.

**The Applicable Fraction must be set up in PORT before the end of the first credit year.**

1. After all units have been set up, click the button titled **Applicable Fraction Calculator** on the right side of the Building screen.

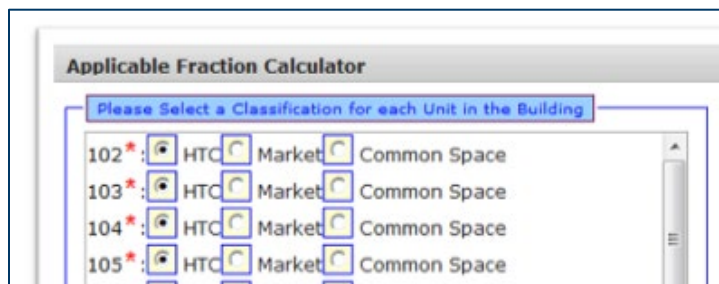
Figure 13: Applicable Fraction Button



The screenshot shows the 'Building' screen for property 'D9999 Building: 210 Main Street E'. It includes fields for Building Number (MN-99-99991), Building Name (210 Main Street E), Address1 (210 Main Street E), Address2, City (Saint Paul), and Zip Code (55101). A red box highlights the 'Applicable Fraction Calculator' button, which is labeled 'Use for Housing Tax Credit Buildings'. Below the button, it states 'Required Applicable Fraction: 100.00 %' and includes a note: 'Note - All the units in the building must be set up before calculating applicable fraction.' There is also a 'Print Building Map' link. At the bottom, it shows 'Units Setup: 23' and a 'Setup Unit' link.

2. Click the radio button to designate HTC, Market, or Common Space for each unit.

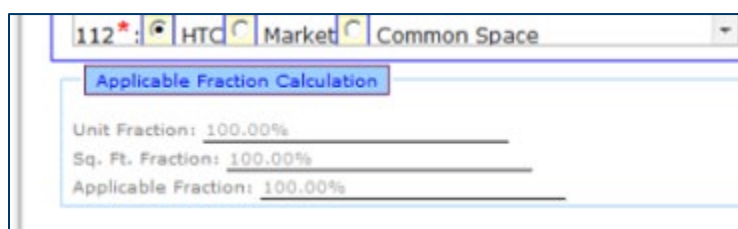
Figure 14: Applicable Fraction Calculator



The screenshot shows the 'Applicable Fraction Calculator' screen with the instruction 'Please Select a Classification for each Unit in the Building'. It lists units 102, 103, 104, and 105. Each unit has three radio buttons for classification: HTC (selected), Market, and Common Space.

3. When all units are designated HTC, Market, or Common Space, check the **Applicable Fraction Calculation** at the bottom of the screen to ensure the calculation is correct. If the Applicable Fraction does not calculate, check to be sure all units have been designated. The Applicable Fraction will not display a calculation until all units have been designated.

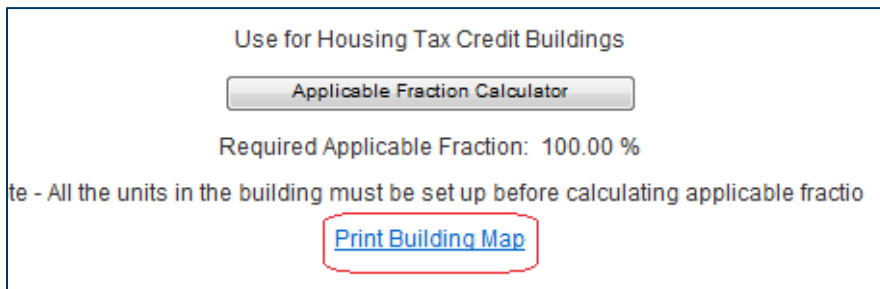
Figure 15: Applicable Fraction Calculation



The screenshot shows the 'Applicable Fraction Calculation' screen. It displays the following information: Unit 112 is selected with HTC, Market, and Common Space radio buttons. Below, it shows 'Unit Fraction: 100.00%', 'Sq. Ft. Fraction: 100.00%', and 'Applicable Fraction: 100.00%'.

4. When finished, click **Save and Close**.
5. Click the hyperlink **Print Building Map** to print a copy of the HTC 28 for the 8609 application.

Figure 16: Print Building Map Link



Use for Housing Tax Credit Buildings

Applicable Fraction Calculator

Required Applicable Fraction: 100.00 %

Note - All the units in the building must be set up before calculating applicable fraction

[Print Building Map](#)

6. Repeat steps 1-5 for each building in the property.

Because of the tax implications involved, Minnesota Housing strongly recommends that the property owner, not the management company, complete the Applicable Fraction Calculator. For new properties the manager may set up units and then the owner should complete the Applicable Fraction Calculator. Print the Building Map to submit with the Placed In Service Application.

The Applicable Fraction Calculator will be locked after the 8609 has been issued. If there is an error, contact the assigned compliance officer.

## 2.05 Loan/HTC

The **Loan/HTC** tab is where loan and tax credit allocation information are maintained. If any information is incorrect or missing, contact the compliance officer assigned to the property.

If the property owner applied for and received additional loan(s) or tax credits at different times, the loan information will be displayed under a separate tab. Each tab contains a funding application number assigned by Minnesota Housing. Some funding application numbers are, "ML" this is simply reflective of applications that were received prior to implementation of Minnesota Housing's current production system.

## 2.06 Loan Detail

Click the View Details link to see additional information for each loan (refer to section 2.07 for HTC Allocation detail).

Figure 17: View Loan Detail Link

User Home » Property »

**D9999: BestApartments**

Property Buildings/Units Owner Reporting Violations Restrictions **Loans/HTC** Admin

H13333 M11744

Project Number: H13333 Application Date: 09/05/2006  
 Project Name: Best Apartments

**All Project Funding Sources**

Description	Source	Amount	Number
HOME Rental Rehab	HOME MF	\$1,184,921	1266616

Number of LTH Units (Agency Goal): 0

**PORT Loans/HTC Allocations**

**Deferred Loan: HOME Rental Rehab**

Program: HOME Compliance End: 06/11/2013  
 Loan Number: 1266616 Amount: \$1,184,921  
 HOME Risk Score: \_\_\_\_\_

[View Details](#)

Under the section titled “Compliance Information,” the following information is shown.

Table 7: Compliance Information

Data Field	Information Presented
Minimum Affordability Period	<p>This will be ‘Yes’ if a legal document (Repayment Agreement, Regulatory Agreement or Declaration) <i>for this loan</i> states that the property is subject to restrictions for a minimum period (usually 15 years), even if the loan is paid off earlier. PORT will display the Minimum Affordability Period Expire Date.</p> <p>This will be ‘No’ if the legal document does not require a Minimum Affordability Period.</p>
Repayment Terms	<p>This will be ‘Repayable’ if the legal document (Repayment Agreement and Mortgage, Note, or Combination Mortgage, Security Agreement and Fixture Financing Statement) requires repayment of the loan.</p> <p>This will be ‘Forgivable’ if repayment is not required at loan maturity. This includes loans that may be fully repayable for the first 10 or 20 years in the event of default and then forgiven in 5% or 10% increments thereafter until the maturity date.</p>
Minimum Rent Subsidy Period End Date	<p>Some loans are made with the condition that the owner continue to renew its project-based rental assistance contract for a minimum period of time as long as renewals are made available by the entity providing the rental assistance. If the legal document (usually the Declaration) requires a MRSP, the end date is displayed here.</p>
Compliance End Date	<p>The date on which compliance with the loan’s restrictions ends. This is typically the same as the maturity date of the loan. Some loans such as HOME, however, have a “Period of Affordability” that may be different than the loan maturity period.</p> <p>Note that for HOME and NHTF properties, PORT will calculate and display a “System Calc Compliance End Date” based on the compliance start date and</p>

Data Field	Information Presented
	the number of years in the affordability period. The same date will display in the Compliance End Date unless Minnesota Housing has extended the Period of Affordability. If Minnesota Housing has extended the Period of Affordability, the end date of that extension period will be displayed.
No Longer Monitored Date and Reason	<p>The No Longer Monitored Date and Reason will be populated after the compliance officer confirms that one of the following is true for the respective loan:</p> <ol style="list-style-type: none"> <li>1. Compliance obligations successfully fulfilled for full term</li> <li>2. Loan paid off /No Minimum Affordability Period</li> <li>3. Loan paid off/Minimum Affordability Period expired</li> <li>4. Agency approved owner's request for release</li> <li>5. Foreclosure by senior lien holder extinguished agency's restrictions</li> <li>6. Foreclosed by Minnesota Housing</li> <li>7. Unable to monitor due to uncorrectable noncompliance</li> </ol>

Figure 18: Deferred Loan Detail

View Deferred Loan

Loan Information from HDS/Escrow

Loan Program: HOME - HOME  
Description: HOME Chronic Homeless  
LoanNumber:   
LoanAmount: \$500,000.00  
Closing Date: 06/03/2008    Maturity Date:   
Term:    Rate: 0 %  
Number of Units Funded:   
Payoff Date:    Forgiven Date:

Compliance Information

Minimum Affordability Period?: Yes  
Minimum Affordability Period Expire Date: 06/04/2028  
Repayment Terms:   
Minimum Rent Subsidy End Date:   
ComplianceEnd Date: 06/04/2028  
Date No Longer Monitored:   
Reason:   
Notes:

If loan documents contain provisions for household targeting and occupancy restrictions, the following will be populated:

Figure 19: Deferred Loan Detail, Household Targeting and Occupancy Restrictions

**Household Targeting & Occupancy Restrictions**

☐ Requires Marketing to Families
 ☐ Required to serve Seniors 55+
 ☐ Required to serve Seniors 62+
 ☐ Requires Smoke Free Policy & Lease
 ☐ Requires High Speed Internet
 ☐ Requires Economic Integration
 ☐ Requires Renewal of Rent Assistance Contract for term of MRSP

# of units set aside and rented to People with Disabilities

# of units set aside and rented to LTH households - targeting single adults

# of units set aside and rented to High Priority Homeless Households - targeting youth or families with children

# of units set aside and rented to High Priority Homeless Households - targeting families with children

# of units set aside and rented to High Priority Homeless Households - targeting youth

# of units set aside and rented to Behavioral Health Needs Households

# of units at or below voucher payment standard for both deferred loans and Housing Tax Credits

If a loan is funded by HOME or NHTF, there will be an additional section with HOME/NHTF Information including whether the assisted units are Floating or Fixed.

Figure 20: Deferred Loan Detail, HOME Information

HOME Information

Compliance Start Date: 6/4/2008
 Years of Compliance: 20
 System Calc Compliance EndDate: 06/04/2028
 IDIS Number: 4944
 Number of HOME Units: 6
 Date of HOME Written Agreement:

Units : ☐ Floating Units ☒ Fixed Units
 View Unit Specifications

## Fixed Unit Designation

The buildings and units will appear under a heading, Fixed Units Specification. Fixed units will have “Yes” in the Fixed Unit column.

Figure 21: HOME Fixed Unit Designation

Fixed Units Specification			
Selected Home Units			
Building ID	Building Name	Unit #	Fixed Unit
MN-99-99991	210 Main Street E	102	Yes
MN-99-99991	210 Main Street E	103	No
MN-99-99991	210 Main Street E	104	Yes
MN-99-99991	210 Main Street E	105	Yes
MN-99-99991	210 Main Street E	106	Yes
MN-99-99991	210 Main Street E	107	No

Once the fixed unit designation is made in the loan detail, the units in the **Building/Unit** tab will have “FX” next to them indicating Fixed HOME or Fixed NHTF.

## Floating Unit Designation

A list of bedroom sizes will appear under a heading, Floating Units Specification, along with the corresponding number of required units.

Figure 22: HOME Floating Unit Designation

Number of HOME Units by Bedroom Type	
Bedroom Size	# Home Units
0/Studio	
1 Bedroom	49
2 Bedroom	18
3 Bedroom	12
4 Bedroom	
5 Bedroom	
6 Bedroom	
7 Bedroom	
Bed	
SRO	

## 2.07 HTC Allocation

Click View Details to see the HTC Allocation detail screen.



Figure 23: HTC Allocation Detail Link

PORT Loans/HTC Allocations	
HTC Allocation Number: 99999	
Allocation Year: 2009	Min Setaside: 40/60
Status: 8609	
HTC only	
<a href="#">View Details</a>	<a href="#">BIN Pages</a>

Use the scroll bar to see additional QAP Restrictions.

Figure 24: Additional QAP Restrictions Detail

### Create HTC Allocation

#### HTC - Carry over/Prelim. Det.

Allocation number\*:

Year\*:

Supplemental nbrs:

Credit pool:

Min set aside:

40/50 Home Set Aside?:

Owner waived right to qual. contract?:

Years owner agreed to waive right to QC:

NOTE: If this is more than 30 years, owner has also agreed to a longer Extended Use Period.

Qualified nonprofit required?:

Number of HPH units:

Number of HTC (restricted) units\*:

Section 1602?:

Section 1602 Recapture Fraction (%):

Minimum Rent Subsidy Period (MRSP) Date:

Credit Types\*:

- ☐ Newly constructed not federally subsidized
- ☐ Newly constructed federally subsidized
- ☐ Rehabilitation expenditures not federally subsidized
- ☐ Rehabilitation expenditures federally subsidized
- ☐ Existing building
- ☐ Not federally subsidized by reason of 40-50 rule
- ☐ Allocation subject to nonprofit set-aside under sec.42(h)(5)

Target Households

- ☐  Elderly
- ☐  Other
- ☐  General Occupancy
- ☐  Families with Children
- ☐  Indv/Families of Color
- ☐  Youth
- ☐  Single Men
- ☐  Single Women

QAP Point-Selection Restrictions

- ☐ Requires marketing to families
- ☐ Requires Economic Integration
- ☐ # of units set aside and rented to People with Disabilities:
- ☐ # of units with rents @ 30% for 5 years after PIS:
- ☐ # of units with rents @ 50% for 5 years after PIS:

Notes:

Information is displayed as follows:

Table 8: Allocation Detail with Descriptions

Item	Description
Allocation number	This is the HTC allocation number assigned by Minnesota Housing. For properties with multiple allocations being monitored together, it is the first assigned number. The first two digits show which QAP year the property received its credits (e.g., 13001 was awarded credits from the 2013 QAP year).
Year	This is the Qualified Allocation Plan (QAP) year in which the property was allocated credits. For properties with multiple allocations being monitored together the earliest year has been entered here.
Supplemental nbrs	Displays the allocation number for any subsequent allocation(s). This applies to properties with multiple allocations that are monitored as one.
Credit Pool	Identifies the pool (nonprofit, for profit, metro, greater MN, etc.) from which the credits were allocated.
Min Set-aside	40/60,20/50 or AIT (Average Income Test) elected by the owner.
40/50 HOME set-aside	'Yes' will be selected if the property is subject to the per-building 40/50 income restriction due to the presence of below-market federal funds (HOME or NAHASDA). Properties allocated credits after 1/1/2009 are not subject to this requirement.
Owner Waived right to qual. Contract?	'Yes' will be selected if the Owner Waived its right to request a Qualified Contract after year 15 by selecting 'extended duration' points or because the QAP requires this for all allocations. 'No' will be selected if owner retained that right.
Qualified Nonprofit Required?	'Yes' if the allocation is from the non-profit pool and the property is subject to material participation by a Qualified Non-Profit. 'No' if the allocation is not from the non-profit pool.
Years Owner Agreed to Waive Right to QC	If owner agreed to waive right to request a Qualified Contract (indicated by Yes in Owner Waived right to qual. Contract field above) and this field is blank, owner has agreed to waive the right to request a QC for the full extended use period. If owner has committed to a shorter or longer period for which it waives the right to request a QC, the number of years will be displayed here.
Number of HPH Units	Displays the number of units required by the allocation of credits for households who meet the state definition of Long-Term Homelessness or High Priority Homeless. The respective box(es) will be checked for any Targeted Population of Singles, Youth, Families or N/A.
Number of HTC restricted units	Displays the total number of units subject to tax credit restrictions for the property.
Section 1602?	There are a small number of properties that were funded with Section 1602 funds (and some of those also have tax credits) under the Housing and Economic Recovery Act. If a property only has tax credits, it will display 'HTC only' or be left blank. If a property has Section 1602 funds and tax credits, it

Item	Description
	will display '1602 and HTC'. If a property has 1602 funds with no tax credits, it will display '1602 only'.
Minimum Rent Subsidy Period (MRSP) Date	If a date is populated, owner has agreed to continue renewing its project-based rental assistance contract through this date.
QAP Point Restrictions	These restrictions will be checked according to the conditions of the allocation as noted in the Preliminary Determination Letter or Carryover Agreement and confirmed in the Declaration of Restrictive Covenants. Refer to list below.
Credit Types	This is reflective of the type of activity the allocation of credit was used to fund (e.g., acquisition/rehab, rehab, or new construction).
Target Households	Checked boxes indicate those populations that owner has represented it will market to and, where known, the number of units owner has represented.

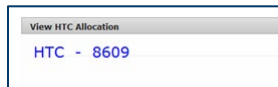
#### QAP Point Restrictions:

*Table 9: QAP Point Restrictions with Descriptions*

Item	Description
Requires marketing to families	This will be checked if the property is required to market to families with children because it received points for Large Family Housing or Access to Higher Performing Schools.
Requires Economic Integration	This will be checked if the owner received points for Economic Integration.
# of units set aside and rented to People with Disabilities	This will be checked and display the number of units required to be rented to people with disabilities.
# of units with rents @30% for 5 years after PIS	This will be checked and display the number of units required to be rent restricted at 30% MTSP for 5 years after the Placed in Service date.
# of units with rents @50% for 5 years after PIS	This will be checked and display the number of units required to be rent restricted at 50% MTSP for 5 years after the Placed in Service date.
# of units with rents @50% for 10 years after PIS	This will be checked and display the number of units required to be rent restricted at 50% MTSP for 10 years after the Placed in Service date.
High Speed Internet	This will be checked if the property is required to have High Speed Internet.
# of units with rents @30% for full term of declaration	This will be checked and display the number of units required to be rent restricted at 30% MTSP for the full term of the Declaration.
# of units with rents @50% for full term of declaration	This will be checked and display the number of units required to be rent restricted at 50% MTSP for the full term of the Declaration.
Eventual Tenant Ownership	This will be checked if the owner received points for Eventual Tenant Ownership.
Smoke Free Policy	This will be checked if the owner is required to have a Smoke Free Policy.

The HTC Allocation Status is shown in blue at the top of the allocation screen. All HTC Allocations are initially set to a default status of “Carryover/Prelim. Det” to accommodate new allocations that will be set up after the Carryover Agreement or Preliminary Determination letter for TE bond deals is executed.

Figure 25: HTC Allocation Status



Allocation status will be changed according to the following events:

Table 10: Allocation Status

Condition	Status
Default status of allocation when initially set up. Owner may have placed building(s) in service but has not yet been issued IRS form 8609 from Minnesota Housing.	Carryover/Preliminary Determination
Compliance Officer has received completed IRS form 8609(s) with Part I completed and verified or updated PORT accordingly.	HTC – 8609
Allocation is in the required 3-year tenant protection period due to any of the following: <ul style="list-style-type: none"> <li>• The Extended Use Period has expired; or</li> <li>• In conjunction with a Qualified Contract request, the one-year period to find a purchaser has expired and owner has certified that no offer was made; or</li> <li>• The property was foreclosed (and not redeemed during the redemption period) or owner provided a deed in lieu of foreclosure.</li> </ul>	3 year protection
Minnesota Housing has ceased monitoring due to any of the following conditions: <ul style="list-style-type: none"> <li>• The 3-year tenant protection period expired and the property is no longer subject to any HTC restrictions; or</li> <li>• A new allocation has established its first credit year which replaces a previous allocation for the same property; or</li> <li>• All reasonable efforts by Minnesota Housing to monitor for compliance have been made but owner is not responsive or fails to bring the property into compliance. All necessary decisions by Minnesota Housing’s Clearinghouse Team have been made, reports have been sent to Owner, IRS, Treasury and/or Minnesota Housing’s Development team; and report of Developments Not in Good Standing has been updated and posted on the Minnesota Housing website.</li> </ul>	No longer monitored

## 2.08 BIN Pages

The BIN page is where the placed in service date(s) and first credit year associated with each building are stored and where the single or multiple-building election is made. Due to tax implications, only the owner's login has permission to complete BIN information and make the tax credit multiple building elections in PORT.

**Notify the compliance officer by email when buildings are PIS** so the appropriate MTSP tables can be set up for reporting unit events. Unit events cannot be reported until the income and rent restrictions are set up.

1. Click the **BIN page** hyperlink to get to this screen:

Figure 26: BIN Page

The screenshot shows the 'BIN Pages' interface. At the top, there is a text field for 'Allocation Number' with the value '99027'. Below this are two buttons: 'Set up Multi-Building Project' and 'Single Building Project Election'. A table displays building data with columns: Project, Election, Building, BIN, Acq PIS, Rehab PIS, New Constr PIS, Credit Start Yr, Rent Flr. Elect, Modified By, and Modified Date. The table contains two rows of data. At the bottom left is a 'Done' button.

Project	Election	Building	BIN	Acq PIS	Rehab PIS	New Constr PIS	Credit Start Yr	Rent Flr. Elect	Modified By	Modified Date
1	NE	<a href="#">332-342 4th St SE</a>	MN-99-92701			10/27/2000	2001		mgarcia	11/20/2014
1	NE	<a href="#">320-330 4th St SE</a>	MN-99-92702			12/22/2000	2001		mgarcia	11/20/2014

2. Click the hyperlink on the building's address to open the building's BIN detail:

Figure 27: BIN Page Data Entry

The screenshot shows the 'Configure HTC Building' dialog box. It has a tab labeled 'HTC Allocation Information'. Inside the dialog, there are several text input fields: 'Building' (210 Main Street E), 'BIN' (MN-99-99991), 'Credit Period Start Year' (2009), 'Acquisition PIS' (1/1/2009), 'Rehab PIS' (6/30/2009), 'New Construction PIS' (empty), and 'Rent Floor Election Date' (12/21/2009). At the bottom are 'OK' and 'Cancel' buttons.

3. The Placed in Service (PIS) Dates should be entered as soon as they are known. The compliance officer will verify this information upon receipt of 8609 with Part II completed. For each building, enter information using the following guide:

Table 11: Data for BIN Pages

Field	Instructions
Credit Period Start Year	Enter the first year of the credit period.
Acquisition PIS	If the allocation involves acquisition credits enter the date the property was acquired.
Rehab PIS	If the allocation involves rehab credits enter the date the rehab is determined to be substantially complete. Note that minimum rehab expenditures must also be met.
New Construction PIS	If the allocation involves new construction credits, enter the date the first unit was determined to be suitable for occupancy. This may be the date of issuance of a temporary certification of occupancy.
Rent Floor Election	If owner completed an Election of Gross Rent Floor, enter the date of the Carryover Agreement, Preliminary Determination Letter, or Placed In Service as indicated on the Election of Gross Rent Floor form. If no election is made (i.e., no election form is submitted), enter the date of the carryover agreement or preliminary determination letter.

4. **Multiple Building or Single Building Project Election:** After the BIN pages have been configured, this election can be set up. An “NE” in the election field means that No Election has been made. Once an election has been set up, that indicator will change to “M” for multiple-building projects, or “S” for a single-building project. Refer to line 8b on Part II of IRS form 8609 and, for multiple-building elections, the required attachment identifying the name, address and BIN of each building in the project (note that it’s possible to have more than one multiple-building project within the same property).
  - a. In the **BIN pages** link, click **Set up Multi-Building Project** for buildings to be treated as one project, or **Single Building Project Election** for buildings to be treated as separate projects.
  - b. Multi-building election – Indicate the buildings that are part of a multiple building project by clicking the box next to the building address. For example, to make BIN’s MN-99-99991 and MN-99-99992 one project, check the boxes next to each respective BIN.

Figure 28: Multiple Building Election

Group Multiple Buildings for HTC

HTC Multi-Building Project Selection

Select 2 or More Buildings to Group Together:

- ☒ MN-99-99991 :210 Main Street E
- ☒ MN-99-99992 :504 Main Street E
- ☐ MN-99-99993 :616 Main Street E
- ☐ MN-99-99994 :204 Main Street E

OK Reset Cancel

- c. Click OK. These buildings now contain a 1 next to the Building address indicating they are part of Project 1. To make other buildings part of project 2, 3, 4, etc., repeat steps for each Project. Buildings already made part of a previous multiple-building project are no longer available to make part of a different project.
- d. Single-building election – Click the **Single Building Project Election** button and select the buildings to be treated as separate projects. Do this even if there is only one building in the property.

Figure 29: Single Building Election

Single Building Project Election

HTC Single-Building Project Selection

Select which buildings are treated as a separate project:

- ☐ MN-99-92701 :332-342 4th St SE
- ☐ MN-99-92702 :320-330 4th St SE

OK Reset Cancel

- e. If you make an error and select the wrong building(s) for either the multi-building or single-building election, clicking the **Reset** button will allow you to start over.

## 2.09 Restrictions Tab

Minnesota Housing's income and rent restrictions are established by certain state or federal statutes, rules, board actions, and Agency policy. These restrictions are set for each property through such legal documents as a Loan Repayment Agreement and Mortgage, Regulatory Agreement, or Declaration of Covenants. Restrictions may cover all units in a property or only some units. However, *the standards may not always be applied to the loan program for the rule that established the standard*. For example, an EDHC loan may use a MTSP income and/or rent restriction. Check legal documents carefully to ensure the correct income and rent limits are used.

PORT will display the restriction standard(s), required number of units, corresponding program, and Y if the restriction is actively being monitored, or N if the restriction no longer applies to the property. PORT's tenant income certifications (initial cert, recert, other cert) utilize these restrictions to calculate and display the income and rent limits for each program. If you believe the restrictions are not correct, contact the assigned compliance officer.

Figure 30: Restrictions Tab

Property
Buildings/Units
Owner Reporting
Violations
Restrictions
Loan/HTC
Admin

Income Restrictions

Restriction	Standard	No. of Units Req.		Selected Programs	Active
<a href="#">Restriction Nui</a> 50% HOME limits		2	HOME		Y
<a href="#">Restriction Nui</a> 80% HOME limits		4	HOME		Y
<a href="#">Restriction Nui</a> 60% of metro median, adj. for HH of 5 or mo 36		36	ELHIF		Y
<a href="#">Restriction Nui</a> 60% of metro median, adj. for HH of 5 or mo 70		70	HTF		Y
<a href="#">Restriction Nui</a> 60% MTSP limits - Table A		70	HTC		Y

Rent Restrictions

Restriction	Standard	No. of Units Req.		Selected Programs	Active
<a href="#">Restriction Nui</a> Low HOME rent limits		2	HOME		Y
<a href="#">Restriction Nui</a> High HOME rent limits		4	HOME		Y
<a href="#">Restriction Nui</a> 30% OF 60% Of Metro Median		70	HTF		Y
<a href="#">Restriction Nui</a> 30% MTSP limits, Table A		28	HTC		Y
<a href="#">Restriction Nui</a> 50% MTSP limits, Table A		42	HTC		Y

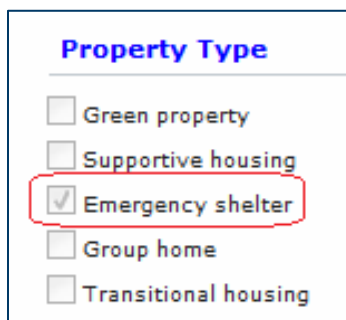


## Chapter 3 – Reporting Unit Events

Minnesota Housing must be able to accurately monitor program compliance and analyze the results of its financing programs. Therefore, unit events for all units in the property must be reported (i.e., report **all** move-ins, certifications, move-outs, unit transfers, etc.).

Buildings that operate as emergency shelters where occupants may only stay for hours or days are exempt from reporting unit events. Check the **Property** tab under Property Type; if the Emergency Shelter box is checked, the emergency shelter part of the property is not subject to reporting unit events. In addition, if the PBCA box is checked on the **Property** tab, submission of tenant data in PORT for deferred loans is not required unless the property is monitored by Minnesota Housing for Housing Tax Credits, HOME, or NHTF, or the Section 8 contract has less units than the number of units restricted by the deferred loan(s).

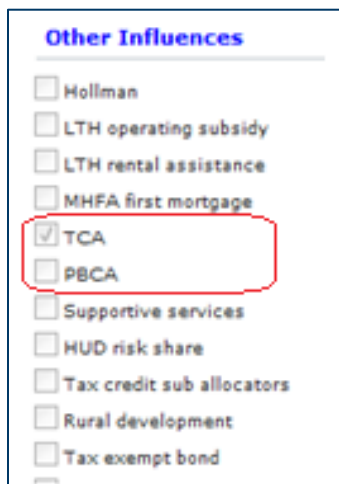
Figure 31: Property Type



The screenshot shows a form titled "Property Type" with a list of checkboxes. The "Emergency shelter" checkbox is checked and highlighted with a red rectangle. The other checkboxes are "Green property", "Supportive housing", "Group home", and "Transitional housing".

Property Type
<input type="checkbox"/> Green property
<input type="checkbox"/> Supportive housing
<input checked="" type="checkbox"/> Emergency shelter
<input type="checkbox"/> Group home
<input type="checkbox"/> Transitional housing

Figure 32: Other Influences



The screenshot shows a form titled "Other Influences" with a list of checkboxes. The "TCA" checkbox is checked and highlighted with a red rectangle. The other checkboxes are "Hollman", "LTH operating subsidy", "LTH rental assistance", "MHFA first mortgage", "PBCA", "Supportive services", "HUD risk share", "Tax credit sub allocators", "Rural development", and "Tax exempt bond".

Other Influences
<input type="checkbox"/> Hollman
<input type="checkbox"/> LTH operating subsidy
<input type="checkbox"/> LTH rental assistance
<input type="checkbox"/> MHFA first mortgage
<input checked="" type="checkbox"/> TCA
<input type="checkbox"/> PBCA
<input type="checkbox"/> Supportive services
<input type="checkbox"/> HUD risk share
<input type="checkbox"/> Tax credit sub allocators
<input type="checkbox"/> Rural development
<input type="checkbox"/> Tax exempt bond

In the **Building/Units** tab, navigate to the building and unit to be reported. There are three types of move-in Events: Unrestricted, Non-revenue, and Program.

Figure 33: Move-In Events

User Home >> Property >> Building >> Unit >>

D9999: Building: 504 Main Street E, Unit:103

**Unit Data**

Total Sq Ft Area: 941 Unit Number: 103 Bedroom Type: 2 Bedroom

Accessible: N Visual Impaired: N Hearing Impaired: N Special Needs: N

Notes:

[Edit Unit Data](#) [Unit Out Of Service](#) [Delete Unit](#)

(Unit Unoccupied)

**Events:**

[Move In - Program](#) [Move In - Unrestricted](#) [Move In - Non-revenue](#) [Move Out](#) [Transfer Out](#) [Initial Cert](#) [Re-Cert](#) [Other Cert](#) [Change Household Type](#)

### 3.01 Move-In: Unrestricted

Report an unrestricted move-in (aka market rate) for units/households that do not, or are not required to, comply with any of Minnesota Housing’s funding or allocation restrictions. Properties where 100% of the units are restricted by one or more Minnesota Housing funding source should not report any Unrestricted Move-ins.

1. Click the hyperlink **Move In – Unrestricted** to open the following data entry:

Figure 34: Move-In Unrestricted Data Entry

**Move-In**

Unit Designation: Unrestricted

Unit 108

Move in Date \*:

Last Name \*:  First Name \*:

Gross Rent \*:

Notes:

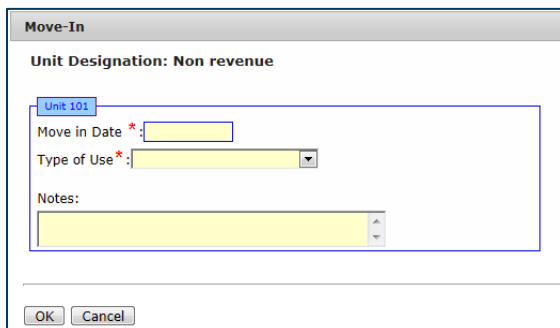
2. Enter the date the Unrestricted household moved into the unit.
3. Enter the last name and first name of the head of household.
4. Enter the gross rent (lease rent) as of the move-in date.
5. Enter any notes you feel may be helpful (this not a required field, it may be left blank).
6. Click **OK**.

### 3.02 Move-In: Non-Revenue Unit

Report a Non-revenue Unit for any unit that has been approved for use other than as a residential rental unit (for example, a unit that otherwise would be rented to a tenant is used for an office, on-site staff, or tenant facility). For tax credit properties, these are known as “common space” units. Typically, these units are not generating rental income, so they are referred to in PORT as Non-revenue units.

1. Click the hyperlink **Move-in Non-Revenue** to open the following data entry:

*Figure 35: Move-In Non-Revenue Data Entry*

The screenshot shows a software window titled "Move-In". Inside the window, the text "Unit Designation: Non revenue" is displayed. Below this, there is a section containing three input fields: "Unit 101" (a text box), "Move in Date \*" (a date picker), and "Type of Use \*" (a dropdown menu). Below these fields is a "Notes:" label followed by a large text area for entering notes. At the bottom of the window, there are "OK" and "Cancel" buttons.

2. For Move-in Date, enter the date the unit became a Non-revenue Unit.
3. From the drop-down list, select the type of use: Site manager, site maintenance, site office, security officer, community center, services center, computer lab, or other.
4. Use notes to describe ‘other’ use and any other helpful information regarding the specific use of the unit.
5. Click **OK**.

### 3.03 Move-In: Program

Report a Move-in - Program if the unit and its occupants comply with any of Minnesota Housing’s loan(s) and/or tax credit allocation being monitored in PORT.

1. Click the hyperlink **Move-in Program**, to open the following detail box:

Figure 36: Move-In Program Data Entry

**Move-In**

**Unit Designation: Program**

Unit 102

Move in Date \*:

Last Name \*:

First Name \*:

Choose all applicable programs/restrictions for the Unit:

	Pgm	Rent Restriction	Income Restriction
++	<input type="checkbox"/> HOME		
++	<input type="checkbox"/> HTC Allocation	60% MTSP limits, Table A	

++ Program has multiple restrictions; you will have to choose one before selecting the program

Notes:

OK Cancel

2. Enter the actual Move-in Date for the household (this is the date the household had the right to occupy the unit with a fully executed lease and the keys to the unit).
3. Enter the Last Name and First Name of the Head of Household (i.e., the primary person in whose name the unit is rented). To protect the identity of victims of domestic violence or households with HIV/Aids in HOPWA units, PORT will accept initials or a client number (if using a client number, it is acceptable to use the same number for both the first and last name).
4. Select all program(s) and restriction(s) for which you are reporting that this household qualifies by clicking in the box to the left of the program name. If a program has more than one available income and/or rent restriction (such as HOME which has 50% and 80% income limits and High HOME and low HOME rent limits) first select the restriction for which the household qualifies from the drop-down list and then click the box to the left of the program name. Check the **Restrictions** tab to see how many units are restricted for each program that financed the property and make sure the correct number of units is reported.
5. Use the Notes field for any helpful move-in information.
6. Click **OK**.
7. System will display a reminder that a certification event must now be reported. Click **OK** and proceed to report the Initial Certification (refer to section 3.04, below).

### 3.04 Report an Initial Certification

The Initial Certification determines eligibility for the respective funding program(s). After reporting a 'Move-in Program', the hyperlinks for other events, including the certifications, will be activated. Report an Initial Certification for the first certification of a program-eligible household.

Figure 37: Other Events

User Home >> Property >> Building >> Unit >>

**D9999: Building: 504 Main Street E, Unit:102**

**Unit Data**

Total Sq Ft Area: 941 Unit Number: 102 Bedroom Type: 2 Bedroom

Accessible: N Visual Impaired: N Hearing Impaired: N Special Needs: N

Notes:

[Edit Unit Data](#) [Unit Out Of Service](#) [Delete Unit](#)

Tenant Type: Program Programs: HOME Current Tenant: Jones, Robert

**Events:**

[Move In - Program](#) [Move In - Unrestricted](#) [Non-revenue Unit](#) [Move Out](#) [Transfer Out](#) [Init Cert](#) [Re-Cert](#) [Other Cert](#) [Change Household Type](#)

1. Click the hyperlink **Init Cert** to activate the detail box.
2. There are two different data entry screens. If the household is reported as being HOME, NHTF, HOPWA, tax credits, TCAP, Section 1602, and/or MARIF eligible, the certification data entry form requires more detail than programs that allow self-certification of income using the [Initial Occupancy Statement by Tenant](#) form. This guide will refer to the certification data entry form with less detail as the 'Summary Cert' and the one with more detail as the 'Detailed Cert.'

## Summary Cert

Click the **Init Cert** link to open the following data entry:

Figure 38: Summary Certification Data Entry

Programs: EDHC Cert Effective Date\*:

**Head of Household**

Name: Shirley Jones Ethnicity:  Gender:  Date of Birth:

Race: ☐ White ☐ Black/African American ☐ American Indian/Alaska Native ☐ Native Hawaiian/Pacific Islander ☐ Asian ☐ Other ☐ Tenant Did Not Respond ☐ Missing/not collected

**Household Characteristics**

Number of occupants age 18 and over\*:  Number of occupants under age 18\*:

☐ Homeless ☐ High Priority Homeless Household

At least one occupant is Mobility Impaired\*:  At least one occupant is Disabled\*:

**Household Rent**

Tenant Contribution\*:  Rental Assistance Amount\*:

Utility Allowance\*:  Assistance Type\*:

Non-Optional Charges\*:  See Section 3.04 of the PORT User Manual for helpful definitions

**Household Income**

Gross Annual Household Income\*:

Main Source of Income:

Complete the data entry as follows:

1. **Cert Effective Date.** Enter the date on which the household is determined to be initially eligible for the program(s) reported. This date cannot be earlier than the move-in date or earlier than the date all parties have signed and dated the Initial Occupancy Statement by Tenant or other income certification document.
2. You will be prompted later to complete the blue box titled **Head of Household**.
3. Under the blue box titled 'Household Characteristics', enter the number of occupants age 18 and over, the number of occupants under age 18 (enter zero if there are no children residing in the unit), check the box next to Homeless if the household was homeless prior to occupancy, check High Priority Homeless for households who meet Minnesota Housing's definition of (i) LTH, (ii) at significant risk of LTH, or (iii) as prioritized for permanent supportive housing by Coordinated Entry.
4. Complete the fields for Mobility Impaired, and/or Disabled (e.g., not mobility impaired but otherwise disabled), as appropriate for the household.
5. Under the blue box titled 'Household Rent':
  - a. **Tenant Contribution.** Enter the amount of the monthly rent payment that the household is responsible to pay.
  - b. **Utility Allowance** for tenant-paid utilities for the size and type of unit from the current utility allowance source document. Enter zero if the landlord pays all utilities.
  - c. **Non-optional Charges.** Enter the amount that is required to be paid, in addition to rent, as a condition of occupancy such as mandatory renter's insurance, mandatory laundry fees, etc.<sup>3</sup> Enter zero if there are no mandatory charges.
  - d. **Rental Assistance Amount.** Enter the amount of governmental rental assistance (e.g., Section 8, Rural Development RA, etc.) paid on behalf of the household. Enter zero if there is no governmental rental assistance.
  - e. **Assistance Type.** Select the appropriate rental assistance type:
    - No rental assistance – this must be selected if you entered zero for Rental Assistance Amount
    - HUD Housing Choice Voucher (HCV), tenant-based
    - HUD Project-Based Voucher (PBV)
    - HUD Multi-Family Project-Based Rental Assistance (PBRA) *(Includes: Section 8 New Construction/Substantial Rehabilitation; Section 8 Loan Management; Section 8 Property Disposition; Section 202 Project Rental Assistance Contracts (PRAC))*
    - HUD Section 8 Moderate Rehabilitation

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<sup>3</sup> Refer to the [HTC and HOME/NHTF Compliance Guides](#) for Permissible and Impermissible Fees that must be treated as rent. Include any such fees as Non-Optional Charges.

- USDA Section 521 Rental Assistance Program (*aka Rural Development Rental Assistance*)
  - State or Local Government Rental Assistance (*includes Housing Support – formerly GRH*)
  - Public Housing Operating Subsidy
  - HOME Rental Assistance
  - Other Federal Rental Assistance
6. Under the blue box titled 'Household Income', from the Initial Occupancy Statement by Tenant form completed by the tenant, enter the Gross Annual Household Income from all sources. From the drop-down list, select the **Main Source of Income** reported by the household on the **Head of Household Demographic Information** form or the rental application.
  7. Click **Create Cert.**
  8. Complete the popup titled 'Edit/Change Head of Household.' From the Head of Household Demographic Information form completed by the applicant/tenant, enter the reported Ethnicity, Gender, Date of Birth, disability status, mobility status, and Race of the Head of Household (if Head of Household identifies as having more than one race, check all that apply). Data fields without a red asterisk are not required but we encourage owner/agents to supply all available information.
  9. Click **Save.**

## Detail Cert

If the reported program is HOME, NHTF, HOPWA, tax credits, Section 1602, TCAP, and/or MARIF, there are two phases to data entry.

## First Phase, Create Cert

Figure 39: Create Cert Data Entry

Initial Certification

Unit: 102 2 Bedroom
D9999: Best Apartments
Move In Date: 10/10/2013

Programs:
Cert Effective Date \*:

Household Composition									
Name	Relationship to Head of Household	Gender	Date of Birth	F/T Student	SSN or Alien Reg Nbr	Race	Ethnicity	Disabled	Mobility Impaired
Robert Jones	Head of Household								

Complete the rent information below and then click Create Cert to proceed to the Detail screen.

Household Rent

Tenant Contribution \*

Rental Assistance Amount \*

Utility Allowance \*

Assistance Type \*

Non-Optional Charges \*

Create Cert

Cancel

Complete data entry as follows:

1. **Certification Effective Date.** Enter the date on which the household is determined to be eligible for the program(s) reported. This date cannot be earlier than the move-in date or earlier than the date the last adult member signed and dated the Tenant Income Certification.
2. **Tenant Contribution.** Enter the amount of the rent payment that the household is responsible for under the lease.
3. **Utility Allowance** for the tenant-paid utilities for the size and type of unit from the current utility allowance source document. Enter zero if the landlord pays all utilities.
4. **Non-Optional Charges.** Enter the amount that is required to be paid, in addition to rent, as a condition of occupancy such as mandatory renter's insurance, mandatory laundry fees, etc.<sup>4</sup> Enter zero if there are no mandatory charges.
5. **Rental Assistance Amount.** Enter the amount of governmental rental assistance (e.g., Section 8, Rural Development RA, etc.) paid on behalf of the household. Enter zero if there is no governmental rental assistance.
6. **Assistance Type.** Select the appropriate rental assistance type:
  - No rental assistance – this must be selected if the rental assistance amount is zero.
  - HUD Housing Choice Voucher (HCV), tenant-based
  - HUD Project-Based Voucher (PBV)
  - HUD Multi-Family Project-Based Rental Assistance (PBRA) (*Includes: Section 8 New Construction/Substantial Rehabilitation; Section 8 Loan Management; Section 8 Property Disposition; Section 202 Project Rental Assistance Contracts (PRAC)*)
  - HUD Section 8 Moderate Rehabilitation
  - USDA Section 521 Rental Assistance Program (*aka Rural Development Rental Assistance*)
  - State or Local Government Rental Assistance (*includes Housing Support – formerly GRH*)
  - Public Housing Operating Subsidy
  - HOME Rental Assistance
  - Other Federal Rental Assistance
7. Click **Create Cert** to go to the second phase.

### Second Phase, Household Composition, Income and Rent

8. Click on the hyperlinked name of the head of household. From the Head of Household Demographic Information form completed by the head of household, enter the reported Ethnicity, Gender, Date of Birth, disability status, mobility status and Race (if Head of Household identifies as having more than one race, check all that apply) and fulltime student status. For

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<sup>4</sup> Refer to the [HTC and HOME/NHTF Compliance Guides](#) for Permissible and Impermissible Fees that must be treated as rent. Include any such fees as Non-Optional Charges.



units reporting under MARIF, if not MFIP eligible, but income eligible select Yes, for ‘SSN Used for MARIF.’

Figure 40: Household Member Links

Household Composition									
Name	Relationship to Head of Household	Gender	Date of Birth	F/T Student	SSN or Alien Reg Nbr	Race	Ethnicity	Disabled	Mobility Impaired
Robert Jones	Head of Household								
<a href="#">Add Household Member</a>									

Figure 41: Household Member Data Entry

Edit Household Member

Relation to head of Household\* : Head of Household

Last Name\* : Jones

First Name\* : Shirley

Middle Initial: S

SSN: .....

SSN Used for MARIF:

Ethnicity\* : Hispanic/Latino

Date of Birth : 2/1/1990

Gender: Female

Mobility Impaired\* : No

Disabled\* : Tenant did not respond

☐ Fulltime Student

Select all race(s) as identified by the household member OR select Tenant did not respond OR Missing/Not collected.

Race\* : ☒ White ☒ Black/African American ☐ American Indian/Alaska Native ☐ Native Hawaiian/Pacific Islander ☐ Asian ☐ Other

☐ Tenant Did Not Respond ☐ Missing/not collected

OK

Cancel

Delete

9. For each member of the household, click the **Add Household Member** hyperlink to add them to the certification. Identify the Relationship to Head of Household from the drop-down list. Enter first and last name. From the Household Member Demographic Information form completed for the respective member, enter the reported Ethnicity, Gender, mobility and disability status, Date of Birth and Race (if the member identifies as having more than one race, check all that apply) and fulltime student status. For units reporting under MARIF, select Yes, for ‘SSN Used for MARIF’ for the member that is MFIP eligible. Data fields without a red asterisk are not required but we encourage owner/agents to supply all available information.
10. **Report household income.** When all household members have been added, report household income. Click the hyperlink titled **Add Entry** to open the data entry box:

December 2025

37

Figure 42: Annual Income Add Entry Link

Annual Income					
Name	Employment/Wages	Social Security/Pensions	Public Assistance	Other Income	
<a href="#">Add Entry</a> Totals					
Add totals above:				TOTAL INCOME	

Figure 43: Household Member Annual Income Data Entry

Household Member: Melvin Martin

Employment/Wages:

Social Security / Pension:

Public Assistance:

Other Income:

OK Cancel

11. Select the **Household Member** from the dropdown menu, and enter the following that is attributable to that member:
  - a. **Employment/Wages:** enter the annual amount of wages, salaries, tips, commissions, bonuses and other income from employment; distributed profits and/or net income from a business. If no income from this source, enter 0.
  - b. **Social Security/Pension:** enter the annual amount of Social Security, Supplemental Security Income, pensions, military retirement, etc. If no income from this source, enter 0.
  - c. **Public Assistance:** enter the annual amount of income received from public assistance such as MFIP, GA, disability, etc. If no income from this source, enter 0.
  - d. **Other Income:** enter the annual amount of alimony, child support, unemployment benefits, regular gifts from persons not living unit the unit, and any other income regularly received by the household. If no income from this source, enter 0.
12. Repeat #11 for each household member with any source of income, including unearned income of minors.
13. **Report household assets.** After all income has been reported, click the **Add Entry** hyperlink in the Income from Assets section to open the data entry.

Figure 44: Income from Asset Add Entry Link

Income from Assets				
Name	Type of Asset	Current/Imputed	Cash Value of Asset	Annual Income From Asset
<a href="#">Add Entry</a> Totals				

Figure 45: Household Member Income from Assets Data Entry

Household Member Income from Assets

Household Member: Jenny M Jones ▼

Type of Asset \*:

Current / Imputed \*: Current ▼

Cash Value of Asset:

Annual Income from Asset:

OK Cancel

14. Select the Household Member from the dropdown menu, and enter the following that is attributable to that member<sup>5</sup>:
  - a. **Type of Asset:** enter a description of the asset (e.g., savings, checking, trust, bonds, Certificate of Deposit, etc.). If there is more than one asset of a particular type it only needs to be listed once.
  - b. **Current/Imputed:** select Current if the person currently holds the asset. Select Imputed if the person disposed of the asset for \$1000 less than the fair market value within two years of the certification effective date.
  - c. **Cash Value of Asset:** enter the cash value (market value minus the cost of converting the asset to cash) of the respective asset. Remember if you are reporting a total of 5 Certificates of Deposit, this would be the cash value of all 5 C/Ds. If the cash value is Zero or negative, enter 0.
  - d. **Annual Income from Asset:** enter the anticipated annual income from the identified asset. Again, if you're reporting 5 Certificates of Deposit, this would be the total anticipated annual income from all 5 C/Ds. If the asset generates no income, enter 0.
15. Repeat #14 for each household member with assets.
  - If total cash value of assets is more than \$5000, PORT will perform the imputed calculation and use the higher of the two to calculate the Gross Annual Household Income.
16. Under the blue heading, **Household Characteristics**, click the **Edit Household Characteristics** hyperlink to open the data entry.

---

<sup>5</sup> If no member of the household has assets, select the head of household, enter N/A for the type of asset, select Current, enter 0 for cash value, and 0 for annual income from asset. Otherwise, compliance staff will assume data entry was missed.

Figure 46: Edit Household Characteristics Link and Data Entry

Household Characteristics

[Edit Household Characteristics](#)

Check High Priority Homeless for households who meet MN Housing's definition of (i) LTH, (ii) at significant risk of LTH, or (iii) as prioritized for permanent supportive housing by Coordinated Entry

☐ Homeless

☐ High Priority Homeless Household

Housing Tax Credit FT Student Status:

Are all Household members Full-Time Students?: No ▼

If yes, Explanation:  ▼

17. Check the box titled **Homeless** if the household was homeless prior to occupancy.
18. Check the box titled **High Priority Homeless** for households who meet Minnesota Housing's definition of (i) Long-Term Homelessness (LTH), (ii) at significant risk of LTH, or (iii) as prioritized for permanent supportive housing by Coordinated Entry.
19. If the household is being reported as a qualified tax credit household, select Yes or No to the question "Are all Household members Full-Time Students?" If yes, select the exemption under which the household qualifies. Select N/A for units not subject to Section 42 restrictions on full-time student households.
20. When all data entry is complete, check the Income and Rent Restrictions sections on the right-hand side of the screen. PORT compares the reported household income and rent to the income and rent limit standards required by the reported program(s) for the household and unit size. PORT will not prevent an owner/manager from moving in or reporting an ineligible household. However, it will indicate if the income and/or rent is over the limit as in this example:

Figure 47: Over Income or Over Rent Appear in Red

Rent Limits

Gross Rent for 2 Bedroom Unit

(includes tenant contrib. util. allowance, non-opt. charges): \$927

**Rent Restrictions**

Restriction Standard	Limit	Over
Low HOME rent limits	\$920	Over

Income Limits

Total Household Income: \$46,410

# of Household Members: 3

**Income Restrictions**

Restriction Standard	Limit	Limit x 140%	Over
50% HOME limits	\$37,050		Over

21. If you are using PORT's TIC to certify the household for the tenant file, click **Print Income Certification** button to print the completed Tenant Income Certification for household and owner/manager to sign, date, and place in the tenant file along with the certification's supporting documentation.
22. Click the **Done** button to complete the reporting and close the data entry screen.

Refer to section 3.11 if you need to correct a data entry error.

### 3.05 Report a Recertification Event

A recertification event is required for all units with a Move-in Program. Recertifications are due on or before the anniversary of the effective date of the previous year's certification. In many cases, a recertification event will only require updating changes in household composition, student status, rent and other information that has changed from the previous certification, but for some programs it may include recertifying household income<sup>6</sup>.

1. Click the **Re-Cert** hyperlink to open the Summary Cert or Detail Cert described in section 3.04.
2. Make the proper selection for, "Exempt from reporting income at recertification?" This is pre-set to "No", which means income must be recertified and reported. Selecting "Yes" means household income does not need to be recertified and allows the recertification to be completed without entering the gross annual household income. Once this selection is made, it cannot be reversed. If you make a mistake, the certification event must be deleted and re-created.
  - a. Leave it at "No" if the program the household qualifies for is MARIF, HOPWA, HOME, NHTF, and/or the project is mixed-income tax credit or mixed-income Section 1602.
  - b. Select "Yes" if the unit is not required to annually recertify income because, 1) the unit is part of a 100% tax credit project and the household is not required to recertify income under HOME, HOPWA, NHTF or MARIF programs, or 2) the unit was financed solely with a Minnesota Housing deferred loan(s) other than those listed in a., above.

*Figure 48: Location of Exempt from Reporting Income at Recertification Question on Detail Cert*

The screenshot shows a form titled "Household Rent". It contains several input fields and a dropdown menu. The "Exempt from reporting income at recertification?" dropdown menu is highlighted with a red box and shows "No" selected. Other fields include "Tenant Contribution", "Utility Allowance", "Non-Optional Charges", "Rental Assistance Amount", and "Assistance Type". A note at the bottom says "See Section 3.04 of the PORT User Manual for helpful definitions".

<sup>6</sup> For convenience, PORT copies some of the household information from the most recent reported certification. It does not copy the checkboxes for Homeless or High Priority Homeless, so those need to be rechecked for recertifications and other certs.

Figure 49: Location of Exempt from Reporting Income at Recertification Question on Summary Cert

The screenshot shows a form titled 'Household Income'. Below the title, there is a question 'Exempt from reporting income at recertification?' with a red asterisk and a dropdown menu set to 'No'. Below this question are two input fields: 'Gross Annual Household Income' and 'Main Source of Income:'. The 'Exempt from reporting income at recertification?' question and its dropdown menu are highlighted with a red rectangle.

3. Follow data entry instructions in section 3.04.

### 3.06 Other Cert

Report an **Other Cert** 1) when an additional household member is added to an existing tax credit, Section 1602, HOME, or NHTF unit's household or 2) for all program units in conjunction with a unit transfer to report the updated rent information (refer to section 3.07 Report a Unit Transfer, below). If an annual recertification is already reporting this information, it is not necessary to also report an Other Cert.

1. Click the Other Cert hyperlink.

Figure 50: Location of Other Cert Link

The screenshot shows a form with the following fields: 'Tenant Type: Program', 'Programs: HOME', and 'Current Tenant: Jones, Robert'. Below these fields is a section titled 'Events:' with several hyperlinks: 'Move In - Program', 'Move In - Unrestricted', 'Non-revenue Unit', 'Move Out', 'Transfer Out', 'Init Cert', 'Re-Cert', 'Other Cert', and 'Change Household Type'. The 'Other Cert' hyperlink is highlighted with a red rectangle.

2. Follow the data entry instructions in section 3.04, above.

### 3.07 Unit Transfer

For all properties, report a unit transfer when an existing household moves from one unit to another in the same building. For properties that do not have tax credits in years 1-15, a unit transfer can be reported when an existing household moves to a unit in another building in the property.

For tax credit properties in years 1-15, transfers to another building are treated as a move-out/move-in<sup>7</sup> unless both buildings involved in the transfer are part of the same multiple-building project (the multi-building election is made on line 8b of IRS forms 8609 and the associated attachment). Before reporting a unit transfer between buildings, check the BIN pages in PORT or line 8b of the respective 8609s to see if a multiple-building election was made.

1. Click the **Transfer Out** hyperlink for the unit the household is vacating.

<sup>7</sup> Households must be income and student qualified to move to a different building that is not part of the same multiple-building project; an initial certification must be reported for the move-in.

Figure 51: Location of Transfer-Out Link

Tenant Type: Program      Programs: HOME      Current Tenant: Jones, Robert

Events:

[Move In - Program](#)   [Move In - Unrestricted](#)   [Non-revenue Unit](#)   [Move Out](#)   **[Transfer Out](#)**   [Init Cert](#)   [Re-Cert](#)   [Other Cert](#)   [Change Household Type](#)

2. The following data entry will appear:

Figure 52: Transfer-Out Data Entry

**Transfer-Out**

**Transfer From**

Building: 504 Main Street E

Unit: 102

Transfer Out Date \*:

**Transfer To**

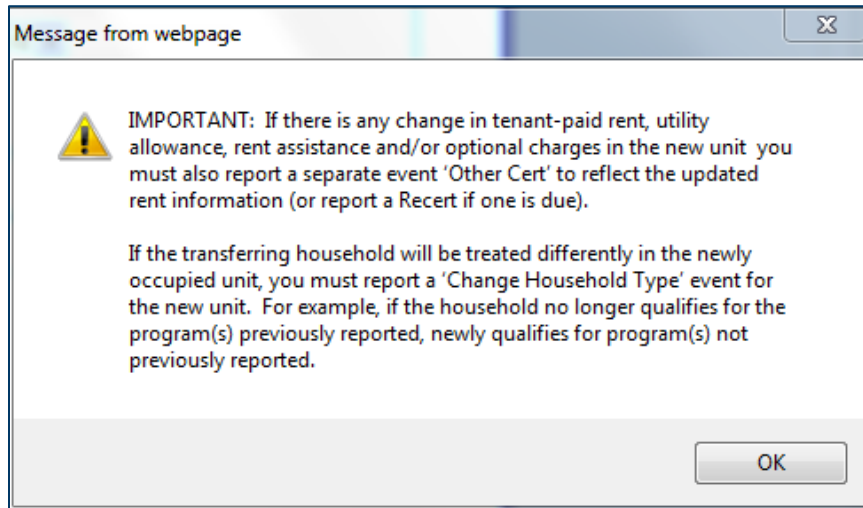
Building \*: MN-99-99992: 504 Main Street E ▼

Unit \*: 108 ▼

Notes:

3. **Transfer Out Date:** Enter the date the household is vacating the unit.
4. From the drop-down list, select the building that the household is transferring to. If the household is transferring within the same building, do not select another building (the building drop-down menu will not appear if there is only one building).
5. Select the unit that the household is transferring to. PORT will not allow a transfer to an occupied unit. If a unit does not appear in the dropdown list, a move-out or transfer out for that unit must be reported.
6. Enter any helpful notes.
7. Click **OK** and the following reminder will appear:

Figure 53: Other Cert Reminder



8. Check the new unit to ensure the transfer was successful. It will appear as a "Transfer in."
9. Where applicable, report Change Household Type event and/or a certification in the new unit.

### 3.08 Move-Out

Report a move out when a household moves completely off the property, a unit changes use from/to a non-revenue unit, or for tax credit properties, when a household moves to another building that is not part of the same multiple building project (in this case, also report a move-in and initial certification for the new building/unit).

PORT will not allow two households to occupy the same unit on the same day. The Move-out date for an existing household must be earlier than the date on which the next household moves in or is transferred in.

1. Click the Move-Out hyperlink to open the following data entry box:

Figure 54: Move-Out Data Entry

A screenshot of a "Move-Out" data entry form. The form has a title bar that says "Move-Out". Inside, there are four labeled text input fields: "Current Tenant:" with the value "Jones, Robert", "Building:" with "616 Main Street E", "Unit:" with "103", and "Move In Date:" with "10/31/2013". Below these is a "Move Out Date \*" field with a yellow background and a date picker icon, and a "Move-Out Reason:" field with a yellow background and a dropdown arrow. At the bottom left are "OK" and "Cancel" buttons.



2. Enter the Move-out Date.
3. Enter the reason for the move-out from the list provided. MARIF units and units reported to meet Minnesota Housing’s definition of Long-Term Homeless are required to enter a move-out reason. While not required for other programs, Minnesota Housing encourages owners/managers to identify the move-out reason for all units.
4. Click **OK**.

### 3.09 Change Household Type

Report a change in household type when an existing household has a change in eligibility. This may be due to new funding being placed on a property with existing restrictions, a loan is paid off or forgiven or the tax credit extended use period expires but other funding restrictions remain. These are some additional change-in-eligibility scenarios:

*Table 12: Change Household Type Scenarios*

Original Status	Changes To
Unrestricted Household	A Program eligible Household (becomes eligible for tax credit, HOME, or other program).
Program eligible household	An Unrestricted Household (no longer program eligible or program compliant or income and rent restrictions no longer apply because a loan matured, paid off or forgiven with no remaining restrictions).
Program eligible for multiple programs	No longer eligible for all programs reported (e.g., MARIF and HOME unit no longer eligible for HOME but remains MARIF eligible). Or, income and rent restrictions no longer apply because a loan matured, paid off or forgiven with no remaining restrictions.
Program eligible household	Becomes eligible for new or existing other programs or different restrictions within the program (e.g., reported HOME eligible, but now also becomes tax credit eligible, or HOME 50% income and low HOME rent becomes 80% income and high HOME rent).

1. Click the **Change Household Type** hyperlink to open the data entry:

Figure 55: Change Household Type Data Entry

**Change Household Type**

Current HH Type: Program

Move in Date: 10/1/2013

Last Name: Smith

First Name: Mary

**Unit 104**

Effective Date of Change \*:

Change To \*: Program \*Change To\From Non Revenue unit must be reported as move-out or move-in

Choose all applicable programs/restrictions for the Unit:

	Pgm	Rent Restriction	Income Restriction
++ <input type="checkbox"/>	HOME	<u></u>	<u></u>
++ <input type="checkbox"/>	HTC Allocation	60% MTSP limits, Table A	<u></u>

++ Program has multiple restrictions; you will have to choose one before selecting the program

Notes:

OK Cancel

2. Enter the **Effective Date of the Change**.
3. **Change to:** If changing from Program to Unrestricted or vice-versa, select the applicable type.
4. Select all applicable **Rent, Income and Program(s)** that the unit now qualifies for. This may mean checking or unchecking a program and/or changing a restriction.
5. If changing to Unrestricted, you will be required to enter the new Gross Rent for the unit.
6. Enter any helpful notes.
7. Click **OK**.

PORT will not allow a change household type to or from a non-revenue unit; a move-out must be reported. Refer to section 3.08.

### 3.10 Unit Out of Service/Back in Service

Report a unit out of service if the unit is not suitable for occupancy for more than one rental period (regardless of the reason and regardless of whether it was occupied or vacant when it became uninhabitable). Refer to the [Report of Casualty Loss](#) form which must be submitted following any casualty loss (including units out of service for more than one rental period) for all properties financed by Minnesota Housing. Submission instructions are on the form.

1. For the respective unit, click the **Unit Out of Service** hyperlink to open the data entry:

Figure 56: Unit Out of Service Data Entry

Out of Service

Building: 210 Main Street E

Unit: 104

Out of Service Date \* :

Out of Service Reason \* :

Notes:

OK Cancel

2. Enter the date the unit became uninhabitable in the Out of Service Date.
3. Select the reason the unit is not habitable from the list provided in the Out of Service Reason toggle: Fire, Flood, Storm/Natural Disaster, Tenant damage, Unit being rehabbed, or Other.
4. Enter Notes to explain “Other” and any helpful information, including additional details about the damage and timeline for repairs.
5. Click **OK**.
6. To report a unit back in service, click the **Unit Back In Service** hyperlink.
7. Update the notes regarding what was done to repair the unit and any other helpful information.
8. Enter the date the unit was made suitable for occupancy.
9. Click **OK**.
10. If the unit was occupied and the same household will not be returning to the unit, report a move-out or transfer out.

### 3.11 Correcting Errors

PORT was built with correction/edit capabilities. With this kind of flexibility, however, comes a lot of caution. It is extremely important that the information in PORT be accurate and correct. It is expected that owners/managers will make any necessary updates or edits prior to the February submission deadline and that only after contacting the assigned compliance officer or in conjunction with a correction or clarification of a monitoring finding will any edits be made after the February submission deadline.

In most cases information can simply be edited by the owner/manager by clicking on the **Detail** hyperlink for the event reported and opening the data entry screen and. PORT records the login name of the user who last modified each event and the date last modified.

Figure 57: Modified By and Date Record

Unit Activity History						
	Date	Tenant	Event	Las Mod By	Last Mod	
<a href="#">Detail</a>	10/17/2013	Mary, Smith	Chg HH Type	bestownereve	10/24/2013	
<a href="#">Detail</a>	10/16/2013		Out of Svc	bestownereve	10/24/2013	
<a href="#">Detail</a>	10/01/2013	Mary, Smith	Move-in, Program	bestownereve	10/24/2013	

PORT also allows the owner/manager to delete events. This might be necessary if a household is inadvertently reported in an incorrect unit, a reported household did not actually move-in, a reported household did not actually move-out or transfer, etc. However, the ability for the owner to delete an event reported in a particular year ends on February 15 of the following year. For example, an event reported with a 7/1/2025 effective date cannot be deleted by the owner/manager on or after 2/15/2026.

1. Under Unit Activity History, click the **Detail** link next to the effective date of the event you wish to delete.
2. Click the **delete** button located in the lower, right-hand corner.
3. A popup will appear asking to confirm that you wish to delete this event. Click **OK**.

Events must be deleted in chronological order. You cannot, for example, delete a move-in when a certification has been reported for the household. The certification must first be deleted and then the move-in; the result is a vacant unit.

### 3.12 Edit/Change Head of Household (HoH)

Household member information can be edited after a certification event is created. For detail certifications, make the name/member change first and then enter the respective income and asset information.

#### Summary Cert

1. Open the certification event.
2. Click the **Edit/Change Head of Household** link.
3. Change the name in the Edit/Change Head of Household screen.
4. Click **Save**.

Figure 58: Edit/Change Head of Household Data Entry

**Edit/Change Head of Household**

Head of Household

First Name \*  Last Name \*

Ethnicity:

Gender:  Date of Birth:

Race: ☐ White ☐ Black/African American ☒ American Indian/Alaska Native ☐ Native Hawaiian/Pacific Islander ☐ Asian

## Detail Cert

Change the name of the HoH:

1. Open the certification event.
2. Click the HoH name.
3. Change the name in the Edit Household Member screen.
4. Click **OK**.

Change HoH to a different or new member:

1. Open the certification event.
2. Click the HoH name.
3. Click the **Delete** button.
4. A warning will appear asking you to confirm and noting that any associated income/asset entries for this person will also be removed. Click **OK** to confirm.
5. Click the name of the member you want to make the new HoH (or, click **Add a Household Member** to add a new HoH to the household).
6. Select 'Head of Household' in the pull-down menu for Relation to head of Household.
7. Click **OK**.

## 3.13 Run Event Summary Report

The Unit Event Summary contains private data on tenants which must be handled in accordance with data privacy laws. If you do not have written permission to share the data with the person or entity with whom you intend to share the report, you must answer 'No' to the certification statement described in #2, below, and you will be unable to run the report. Obtain a copy of the required release form from the person, lender, or company, have all tenant households sign a form, and then you may answer 'Yes' to the certification statement and run the Unit Event Summary Report. We recommend you maintain the signed release form in each respective tenant file.

The **Building** tab contains a hyperlink that allows the owner/manager to run a summary of unit events in Excel.

Figure 59: Run Event Summary Report Link



1. Click the link.
2. Answer yes or no to the certification statement.

Figure 60: Certification of Permission to Share Information

I certify that each tenant household has given written permission to share their private data with the people or entities that will receive a copy of this report:

3. If you plan to share the report with external parties **and** you have written permission from each tenant household to share their data with the person or entity (e.g., lender, suballocator, or other person/entity that is not part of the ownership or management company) or you do not plan to share the report with external parties you may select 'Yes.'
4. Enter the report start and end date for the range of event dates you are requesting data and click **Create**.
5. Indicate if you want to open or save the Unit Event Summary.

## Chapter 4 – Annual Owner Certification Submission Site, Owner Reporting Tab, and Property Operating Data

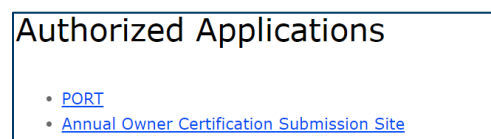
### 4.01 Annual Owner Certification Submission Site

On or before February 15 of each year (or the next business day), owners must submit their certification of compliance for tax credits, HOME, NHTF, and/or Minnesota Housing’s deferred loans for the previous monitoring year (e.g., owner certifications for monitoring year 2024 were due on 2/17/2025).

Owners must complete the certifications in the Annual Owner Certification Submission Site (AOC Submission Site). The AOC Submission Site is separate from but connected to PORT. The AOC Submission Site link is available only to the property owner using the Owner or OAA login; it is not visible to Minnesota Housing staff, or to Management or Site Management accounts.

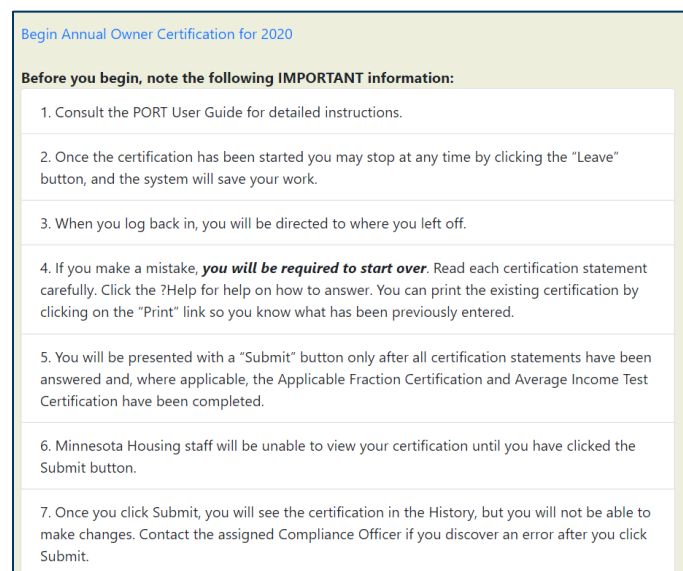
To access the AOC Submission Site, log in to the Global Sign-on and click the **Annual Owner Certification Submission Site** link (not the PORT link).

*Figure 61: Authorized Applications*



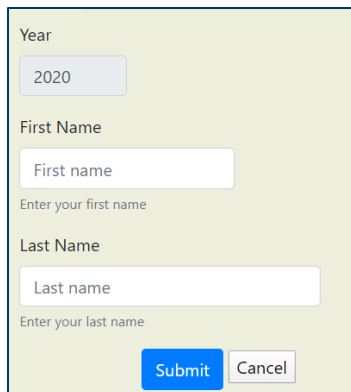
A screen similar to the one below will appear or, if your login allows access to multiple properties, a list of your properties. If you have a list of properties, click the link for any property to get to this screen. Read the important information carefully, then click the **Begin Annual Owner Certification** link.

*Figure 62: Important Information for Annual Owner Certification*



On the next screen, enter your first name and last name. Click the **Submit** button.

Figure 63: Owner Certification Data Entry, First Name and Last Name



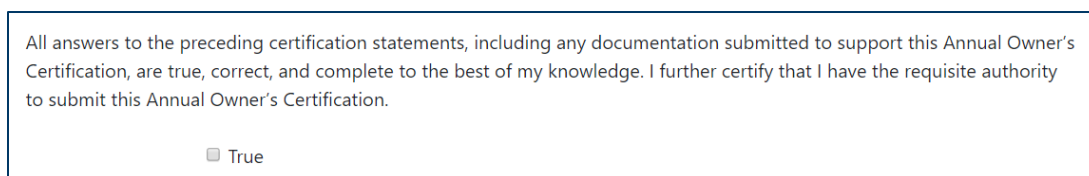
The screenshot shows a form titled "Owner Certification Data Entry, First Name and Last Name". It has a light green background. At the top, there is a "Year" field with a dropdown menu showing "2020". Below that is a "First Name" field with a text input box containing "First name" and a hint "Enter your first name". Below that is a "Last Name" field with a text input box containing "Last name" and a hint "Enter your last name". At the bottom right, there are two buttons: a blue "Submit" button and a white "Cancel" button.

## Deferred Loan Owner Certification

If the property has a deferred loan for which an owner's certification is required, the deferred loan certification statements will be presented first. If your property also has a Minnesota Housing amortizing first mortgage or only has housing tax credits, the deferred loan certification statements will not be presented. The deferred loan certification begins by asking you to indicate whether the property is occupied or unoccupied due to construction or rehabilitation. Select Occupied if one or more units is occupied. Select unoccupied if no units are occupied due to construction or rehabilitation.

If you select unoccupied, you will only be asked to certify that the statements you made were true and that you have the authority to submit the annual owner certification.

Figure 64: Certification Statement that Information is True, Correct and Complete



The screenshot shows a form titled "Certification Statement that Information is True, Correct and Complete". It has a light green background. The text reads: "All answers to the preceding certification statements, including any documentation submitted to support this Annual Owner's Certification, are true, correct, and complete to the best of my knowledge. I further certify that I have the requisite authority to submit this Annual Owner's Certification." Below the text is a checkbox labeled "True".

If you select occupied, you will be prompted to complete all Deferred Loan Owner Certification statements. Refer to Exhibit A, below, for a list of the Deferred Loan Owner Certification Statements.

The certification statements cover the entire year so if at any point during the year a statement was untrue, select "False." False responses require an explanation. Be detailed and specific in your explanations both for why the project was or is not in compliance with the item being certified and what actions you did or are taking to correct the noncompliance. Explain whether the noncompliance is corrected and include the date of correction or when you expect the noncompliance to be corrected.



Figure 65: Answering False Requires Explanation

☐ True

☒ False

Explain why Project is not in compliance with this requirement and what action owner is taking to correct

If the property does not also have tax credits, skip the next section and follow the instructions below to Submit the Certification to Minnesota Housing.

**Housing Tax Credit Owner Certification of Continuing Program Compliance**

If the property has a deferred loan and housing tax credits, the screens with the housing tax credit certification statements will automatically follow the last deferred loan certification statement. If the property does not have a deferred loan, the certification will start here.

You will first be prompted to select which one of the below statements is true for the project. It is very important to make the correct selection. Once you make the selection, you will be prompted to complete the certification statements appropriate to the status of the allocation(s) for the property. If you have any questions about which option you should select, contact the assigned compliance officer before you begin.

Table 13: Tax Credit Certification Statement and Instructions

Certification Statement	Do not select if
1. The certification year is 1-15 of the compliance period for the property’s tax credit allocation(s) and/or Section 1602.	The project has been resyndicated with new credits that have not started their first credit year and the original allocation is in year 16 or later of the extended use period.
2. The certification year is 16 or later for the property’s tax credit allocation and/or Section 1602 (i.e., the 15-year compliance period has expired for all allocations).	The project has been resyndicated with new credits and buildings are not yet placed in service or are in year 1-15 of the compliance period for the new credits.
3. The certification year is 16 or later for the property’s tax credit allocation(s) and/or Section 1602 AND the property is subject to monitoring by the US Department of Housing and Urban Development (HUD) or the US Department of Agriculture (USDA) Rural Development (i.e., the 15-year compliance period has expired for all allocations and the property is subject to HUD MOR reviews and REAC inspections or USDA Rural Development’s Supervisory Reviews).	The project has an allocation in years 1-15, or The project is in year 16 or later, but is not subject to HUD or USDA oversight.

Certification Statement	Do not select if
4. Property has one tax credit allocation, it has not placed any buildings in service or has placed buildings in service but owner is certifying that this certification year is not the first credit year.	The certification year is the first credit year or later.
5. Property received an allocation of tax credits or Section 1602 and in later years received a subsequent allocation of tax credits (resyndication). The first allocation is in year 16 or later, and the resyndication has not yet placed buildings in service or has placed buildings in service but owner is certifying that this certification year is not the first credit year.	The project only received one allocation of tax credits, or The owner has established first credit year for the resyndication credits.
6. All tax credit allocations and/or Section 1602 are in the three-year tenant protection period following completion of the qualified contract period, legitimate foreclosure or deed in lieu of foreclosure, or expiration of the extended use period.	The extended use period has not expired for both the original tax credits and the resyndication, or The first credit year for all buildings was not the same year and the extended use period for one or more building has not expired.

Refer to Exhibit B for a complete list of HTC certification statements. Note that only the relevant certification statements will appear, based on which selection you made from the options above.

The certification statements cover the entire year so if at any point during the year a statement was untrue, select “False.” False responses will require an explanation. Be detailed and specific in your explanations both for why the project was or is not in compliance with the item being certified and what actions you did or are taking to correct the noncompliance. Explain whether the noncompliance is corrected and include the date of correction or when you expect the noncompliance to be corrected.

*Figure 66: Selecting False Requires an Explanation*

True/False

At initial occupancy, Owner has received a Tenant Income Certification from each low-income resident and documentation to support that certification, and if applicable, at annual recertification, Owner has received a Tenant Income Certification and documentation to support that certification

☐ True
 ☒ False

Explain why Project is not in compliance with this requirement and what action owner is taking to correct

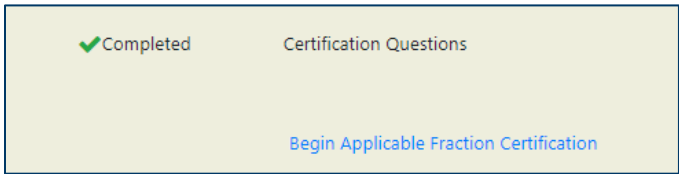
Submit any items noted on the certification (e.g., inspection reports, fair housing violation reports). Use the [Secure Upload Tool](#) and send to [mhfa.compliance@state.mn.us](mailto:mhfa.compliance@state.mn.us) (do not email to this account

directly). Include the D number, Property Name, and the name of the assigned compliance officer in the subject line. **Notify the compliance officer** by email when items are sent via the Secure Upload Tool, as they do not receive notification from this system and system only retains the information for seven calendar days

**Applicable Fraction Certification**

If you indicated that the tax credit allocation is in the 15-year compliance period or the extended use period, you will be required to complete the Applicable Fraction Certification. Click the **Begin Applicable Fraction Certification** link.

Figure 67: Location of Begin Applicable Fraction Certification Link



Enter the unit fraction and square foot fraction for each building as of the end of the taxable year for which you are certifying. PORT will record the lesser of the two for the Applicable Fraction for the year.

Figure 68: Unit Fraction and Square Foot Fraction Data Entry

Bldg Nbr	Bldg Name	Unit Fraction	SqFt Fraction	Applicable Fraction	Reqd Applicable Fraction	Exception
MN-05-94001	230 3rd St W	100	100	100%	100.00%	

**Average Income Test (AIT) Certification**

For properties that have elected the AIT minimum set-aside for housing tax credits, owners must first complete the single or multiple building election in the BIN pages before completing the AIT Certification. Refer to section 2.08 of this PORT User Guide for instructions on completing the BIN pages.

To complete the AIT Certification, click the **Average Income Test Certification** link in the AOC Submission Site (this link only appears for properties where the Average Income Test is selected in the HTC Allocation details in PORT).

Figure 69: Location of Average Income Test Link

[Begin Owner Certification](#)
  
[Begin Applicable Fraction Certification](#)
  
[Average Income Test](#)

1. Click the **Edit** link.

Figure 70: Location of Edit Link in Property Average Income Test Certification

### Property Average Income Test

	Project	Nbr Bldgs	Building Numbers	TI Units	Calculated Avg
<a href="#">Edit</a>	1	1	MN-16-09010	0	0

Done

2. Enter the total number of units in all the BINs in the identified project. PORT will calculate and display the minimum number of units needed to meet the Minimum Set-Aside (MSA).
3. For each MTSP percentage, enter the number of units by bedroom size that were income and rent restricted at the end of the report year for the project. PORT will calculate the imputed average. If the calculated average is below 60 percent, the indicator will stay green. If the calculated average exceeds 60 percent, the indicator will turn red indicating that the project is not in compliance with the imputed average.
4. Repeat the process to certify the AIT for all other projects within the property.

Figure 71: Average Income Test Certification Data Entry

Enter the total number of units in project 
Minimum number of units for MSA

For each MTSP percentage, enter the number of units by bedroom size that were income and rent restricted at the end of the report year.

Studio	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	Total	MTSP
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	20 %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	30 %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	40 %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	50 %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	60 %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	70 %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	80 %
0	0	0	0	0	0	0	0	

Calculated Average 0.00%

### Correcting Owner Certification Errors

Because of the dynamic nature of the owner’s certification (e.g., a False statement requires explanation, certain statements are dependent on how previous statements were answered), when user clicks **Continue** on any screen, it and all previously completed certification statements are unavailable to edit. Users must click the **Reset Certification/Start Over** button to correct mistakes.

Before clicking Reset Certification/Start Over, we recommend printing the correct responses already submitted to help you recall the answers that don’t need correcting. Click the **Print** button in the History (note that the status of “In Progress” will remain until you have submitted to Minnesota Housing using the instructions below).

Figure 72: Location of Print Link on Annual Owner Certification History

History - Annual Owner Certs		
Year	Status	
2020	In Progress	<a href="#">Print</a>

Once you click the **Reset Certification/Start Over** button, you will be asked if you want to start over. Click **Yes** to wipe out your responses.

Figure 73: Start Over Data Entry

Start Over?

Do you want to remove all answers you've made?

Yes, wipe out my responses

No

Click the **Continue Annual Owner Certification** link to start the certification over.

Figure 74: Location of Continue Annual Owner Certification Link

[Continue Annual Owner Certification for 2020](#)

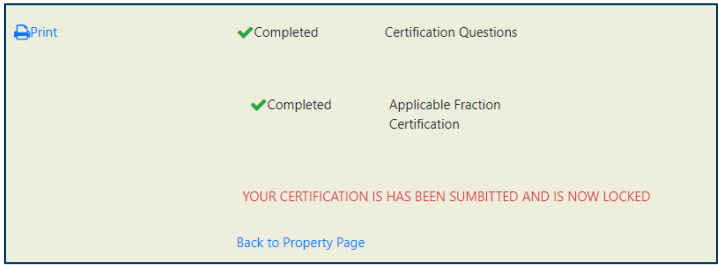
History - Annual Owner Certs

### Submit the Certification to Minnesota Housing

When all certification statements are complete and accurate (and if applicable, the Applicable Fraction Certification and Average Income Test Certification are complete and accurate), click the **Submit to Minnesota Housing** button and then the **CONFIRM SUBMIT** link.

PORT then displays an acknowledgement that the certification has been submitted and is now locked.

Figure 75: Completed Owner Certification Screen



Click the **Back to Property Page** link to return to the AOC Submission Site to see the History of owner certifications that have been completed and submitted to Minnesota Housing (note that it does not display owner certifications submitted to Minnesota Housing prior to 2020 via the **Owner Reporting** tab in PORT).

Use the print link to print the certification forms or save to PDF for your records. It is not necessary to mail a hard copy to Minnesota Housing. The PDF and printed form will show the date the certification was completed (or display “not yet completed” if it has not been properly submitted to Minnesota Housing).

4.02 Owner/HH Paid Utility

This section on the **Owner Reporting** tab is used to report which utilities are paid for by tenants and which are paid by the owner/manager. This information will be used when monitoring utility allowances and is expected to be up-to-date and accurate.

- 1. On the **Owner Reporting** tab, click the **Set-up/change** hyperlink to open the data entry.

Figure 76: Location of Setup/Change Link for Utility Allowances

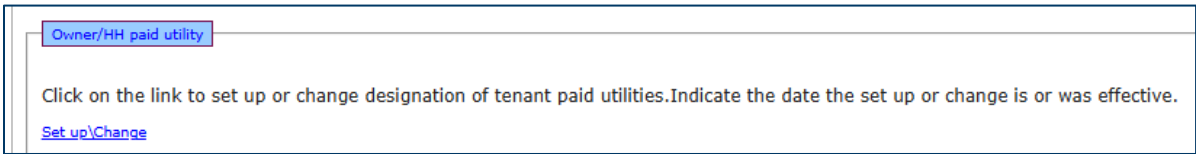


Figure 77: Utility Allowance Data Entry

**Owner Paid/Tenant Paid Utility**

**D9999: Best Apartments**

Below Indicate whether each utility type is owner paid or tenant paid

Effective Date	Utility Type
3/12/2014	Unit Heat
	Water Heat
	Cooking
	Unit Electric
	Water
	Sewer

Units have electric stoves.

Other Notes:

OK Cancel

2. Enter the date on which the owner/manager established the lease requirements for tenant paid utilities to be reported.
3. Click the radio dials to indicate whether each utility type is paid by the owner (Owner Pd) or paid by residents (HH Pd).
4. For the illustration above, this new property opened on 3/12/2014; owner is reporting that the leases for all residents require them to pay unit heat, cooking electric, and unit electric. Owner pays all other utilities. Owner noted that units have electric stoves.
5. Click **OK**.
6. To reopen, simply click the **Effective Date**.
7. To change, repeat steps 1-5 above. Enter the date the policy changed as the new effective date. PORT will save the history of when the responsibility for tenant-paid utilities changed. For example, on 9/22/2017, owner changes leases to require tenants to pay for water and sewer. The effective date would be 9/22/2017 and the report would look like this:

Figure 78: Example of Utility Allowance Change

**Owner Paid/Tenant Paid Utility**

**D9999: Best Apartments**

Below Indicate whether each utility type is owner paid or tenant

Effective Date	Utility Type
9/22/2017	Unit Heat
	Water Heat
	Cooking
	Unit Electric
	Water
	Sewer

Units have electric stoves.

Other Notes:

OK Cancel

### **4.03 Property Operating Data**

A portion of properties with Agency deferred loans were required to submit annual operating data (financial data on income and expenses for the property). Operating data is no longer required to be submitted. However, owners are responsible for maintaining annual operating data and submit to Minnesota Housing upon request.



## Chapter 5 – Violations Tab

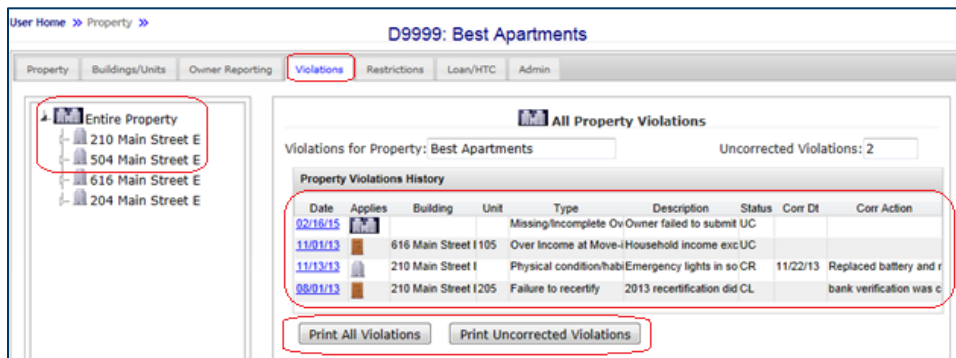
All noncompliance resulting from review or inspection is recorded in the **Violations** tab on a Property, Building, or Unit level, depending on the nature of the noncompliance. The Violations History tracks the history of all the violations associated with a property and timeliness of correction. Users may view but not edit this data.

**Property Violation** is noncompliance that affects the entire development. For example, failure to submit the owner's annual certification or report tenant data is noncompliance on a property level.

**Building Violation** is noncompliance that affects a particular building. For example, a leaking roof or cracked foundation on a particular building affects the entire building because the roof covers the entire building and the foundation holds the entire building. Noncompliance in common areas is a building violation because common areas are used by all occupants of the building.

**Unit Violation** is noncompliance that affects a particular unit. It may be the physical unit, or it may be noncompliance associated with the unit's occupants such as an over-income household.

Figure 79: Location of Property, Building and Unit Violation Links and Buttons for Print All or Print Uncorrected Violations



1. Click the **Violations** tab for the property.
2. All violations will be shown under Property Violations History with a status of UC (uncorrected), CL (clarified), or CR (corrected).
3. On the left side of the screen, click **Entire Property** to see all violations; click an individual building icon to see that building's violations; click the small triangle next to the building to access the units; click an individual unit to see unit violations.
4. Click the **Print All Violations** button to print a complete violation history (includes those that are corrected or clarified) or click the **Print Uncorrected Violations** to print a report of violations for which Minnesota Housing has not received sufficient documentation of correction. Compliance staff will attach the Uncorrected Violations report to the notice of noncompliance.
5. The violation counter on the right-hand side of the **Violations** tab (and above the Property Owner name on the **Property** tab) will show the number of Uncorrected Violations.

- Click the **Date** hyperlink to see full details of the violation.

Figure 80: Example of Violation Detail

View Violation

Date Out of Compliance\*: 02/16/2015
Type of Violation\*: Missing/Incomplete Owner Cert
UPCS Level\*: Not Applicable
Violation Description\*:
Owner failed to submit the 2014 Deferred Loan Owner Certification required for HOME compliance.
Violation Status\*: Uncorrected
Date Back in Compliance:
Warning: Changing the status from Corrected to Uncorrected or Clarified will automatically delete the Date Back in Compliance and Corrective Action.
Corrective Action:
Program(s) violated (choose all that apply for this violation)\*:
☒ HOME

Figure 81: Location of Total Uncorrected Violations on Property Tab

User Home >> Property >>

D9999

Property
Buildings/Units
Owner Reporting
Violations
Restrictions

Property Number: D9999
Name: Best Apartments
Address1: Multiple Building Addresses
Address2:
City: Saint Paul
Zip Code: 55101
County: Ramsey
Year Built: 1976
Region: MHIG
E. D. Region: 11
No of Buildings: 4
Total Number of Units: 110

Current HTC/Deferred Loans: HOME, HTC
Property Lease Up Date: Change

[Name History](#)
[Property Entities](#)
[Assigned Staff](#)
[Report change in ent](#)

Total Uncorrected Violations for this property: 2

- When Minnesota Housing has received sufficient evidence of clarification or correction, the UC status will be updated to CL or CR.

## Chapter 6 – Assign an Owner’s Account Administrator

Many properties financed by Minnesota Housing are owned by a single-asset business entity and a separate username and password for each property may be impractical for the partner or member that is involved in many entities and properties. Therefore, Minnesota Housing will allow an owner to appoint an Owner’s Account Administrator (OAA). The OAA must be a related party of the ownership entity. A management company is not allowed to be an OAA unless the management company is a related party of the ownership entity (e.g., a partner or member).

Appointing an OAA will allow access to a defined portfolio under one username and password. For example, ABC Company is a partner in Best Apartments Limited Partnership that owns Best Apartments, and ABC Company is also a member in Awesome Apartments LLC that owns Awesome Apartments. ABC Company can submit an OAA designation form (with Mary Smith as the OAA contact) to request ABC Company to be the OAA for both properties. Minnesota Housing issues one username and password to ABC Company with Mary Smith as the OAA contact. When Mary Smith logs into PORT using the OAA logon, she has access to both Best Apartments and Awesome Apartments.

If an owner wishes to appoint an OAA, it must read and sign the [Owner’s Designation of Account Administrator form](#). The OAA’s username and password will allow access to authorized properties as if the OAA were the owner.

Submit a signed and dated, Owner’s Designation of Account Administrator form to ATTN: PORT USER ACCESS, Minnesota Housing, 400 Wabasha Street, Suite 400, St. Paul, MN 55102, or email to [renee.dickinson@state.mn.us](mailto:renee.dickinson@state.mn.us). **Be sure to maintain your own copy of this form.**

Once the OAA designation has been approved, a username and password will be sent to the OAA.

The owner or Owner’s Account Administrator is responsible for and in control of property access rights. In addition, the owner (not the OAA) is responsible for immediate notification to Minnesota Housing of any changes to the owner’s Account Administrator through the re-submission of a designation form.

## Chapter 7 – Assign a Management and Site Management Account

Minnesota Housing cannot provide management access to PORT. It is owner's responsibility to authorize or deny management company access to PORT.

Submitting a Request for Action to Minnesota Housing with management company changes or the form for contact changes only updates Minnesota Housing's official records, it does not update PORT's Management or Site Management accounts. The titles "Management Account" and "Site Management Account" are merely labels. These accounts may be assigned by owner to its compliance staff, third party consulting company or other staff responsible for PORT reporting.

Management and Site Management Accts must be assigned to at least one property or they go dormant and cannot be assigned to properties.

### 7.01 Create a New Management Account and Assign it to a Property

First, click the **Search for Mgmt Accounts** button to see if an account is already in the system. Using an existing account allows that management company to access all their properties with the same login. A fee manager may have been set up by a different owner. Search by management company name, address, etc., or leave blank to view a list of all Mgmt Accts in PORT. If the Mgmt Acct exists, follow the instructions in section 7.02, below.

To set up a new account:

1. Click the **Admin** tab.

Figure 82: Location of Admin Tab



2. Scroll to the Assign/Deny Property Access section in the middle of the page.
3. Select **Assign Access – Mgmt Acct.**
4. From the properties listed, select the property to which you want to give this account access by checking the box to the left of the property.
5. Click the **Create Mgmt Account** button to open the new account entry form.
6. Enter the new Management Account user information in the data entry form including assigning a Login Username. All fields with a red asterisk are required fields. Because management staff may change, we recommend using a dedicated or non-personal email address for Management Accounts. If a personal email address is used and later that person leaves the company or is no longer responsible for PORT reporting, the owner would need to deny access to that account and set up a new one for new staff.

Figure 83: Management Account Data Entry

**New Management Account**

**Company Information:**

NOTE: Management Company Name represents the account name. Multiple accounts cannot be set up under the same Management Company Name.

\*Management Company Name:

\*Address :

\*City :

\*State :

\*Zipcode :

**User Information:**

\*First Name :

\*Last Name :

Phone# :

\*Email :

\* Retype Email :

\*Create Login User Name :

Save Account Info Cancel

7. Click the **Save Account Info** button.
8. An email will be sent to the new user with a username and temporary password. Some users report that, due to their security settings or filters, these emails land in their junk/spam folders so be sure to check those if you do not receive the email in your inbox.
9. To assign additional properties to the new account, follow instructions in section 7.02.

Once a Management Account has been set up, the management company name, username, and email address cannot be edited. To edit other information, refer to section 7.03.

## 7.02 Assign an Existing Management Account to a Property

If a Management Account already exists, that account may be assigned to additional properties.

1. Under the “Search Management Accounts” section, select company name or other search criteria and enter the search info, or leave blank to search all PORT management accounts.
2. Click the **Search for Mgmt Accounts** button.
3. From the Search Results list, check the box on the left of the desired management account.
4. Click the **Confirm Account Selection** button.
5. Scroll down to the section for Assign/Deny Property Access.
6. Select **Assign Access – Mgmt Acct** radio button.
7. Find the property or properties to which you wish to assign the account and check the box(es) to the left.
8. Click the **Confirm Property Access** button.
9. A pop-up will appear asking if you want to assign the selected properties to the management account. Click **Yes** and system will acknowledge that you have successfully assigned the selected properties to the Management Account. Click **No** if you have made a mistake or otherwise do not want to assign access.

### 7.03 Edit Management Account

For security reasons, no edits may be made to the management company name, username, and email address. If any of this information changes, owner must deny access to the account (refer to Chapter 8) and a new account must be set up. To make any other changes:

1. Under the “Search Management Accounts” section, select company name or other search criteria and enter the search info below, or leave blank to search all PORT management accounts.
2. Click the **Search for Mgmt Accounts** button.
3. From the Search Results list, check the box on the left of the desired management account.
4. Click the **Confirm Account Selection** button.
5. Click the **Edit Selected Management Account** button.
6. Update information as necessary.
7. Click **Submit** when finished.

### 7.04 Assign a Site Management Account

Only a Management Account can set up a Site Management Account. Follow the same steps in section 7.01 to create and assign a new site management account or 7.02 to assign a property to an existing site management account.

## Chapter 8 – Deny Access to a Management Account or Site Management Account

The owner or owner account administrator is responsible for controlling who is authorized to access its properties in PORT including denying management or site management access due to changes in management companies and/or staffing within a management company. Submitting a Request for Action to Minnesota Housing with management company changes or the form for contact changes only updates Minnesota Housing's official records, it does not update PORT's Management or Site Management accounts.

PORT will display a warning message if an owner denies access to the last property to which the account is assigned. Once a management account or site management account is no longer assigned to any properties, it is no longer available to be assigned to any properties. A new account would need to be set up.

If an owner denies access to a Management Account, any Site Management Accounts created by that Management Account will also be denied.

### 8.01 Deny Access to Management Account

1. Scroll to the Assign/Deny Property Access section of the **Admin** tab.
2. Select **Deny Access – Mgmt Acct** radio button.
3. Select the property or properties for which you want to deny management account access by checking the box to the left of each property.
4. Click the **Confirm Mgmt Access Denied** button.

Note that denying access to the Mgmt Acct also denies access to the associated Site Mgmt Acct.

### 8.02 Deny Access to Site Management Account

Site Management access may be denied by the owner/OAA or Management Account. Follow these steps to deny access to a site management account:

1. Scroll to the Assign/Deny Property Access section of the **Admin** tab.
2. Select **Deny Access – Site Mgmt Acct** radio button.
3. Select the property or properties for which you want to deny site management account access by checking the box to the left of each property.
4. Click the **Confirm Site Mgmt Access Denied** button.

## Chapter 9 – XML File Upload to PORT Submission Site

If your property management software has a utility that allows you to download tenant data into an XML file, Minnesota Housing's XML Upload to PORT Submission Site may be used to populate your property's unit events.

### 9.01 XML File Requirements

1. Refer to Minnesota Housing's [PORT XML schema](#) and [XSD specification file](#) for requirements.
2. All building and unit numbers must match those set up in PORT (note that new properties must first set up units in PORT before uploading tenant data; the XML file upload will not populate unit set up data, only unit events).
3. The effective date of all events must be displayed on the XML file *in chronological order*.
4. Out of service and back in service events are not considered tenant data and are not part of XML file. Those events must be manually entered in PORT.
5. Existing PORT data will not be overwritten. The XML file must only contain events with effective dates that are later than the last effective date reported in PORT for any unit in the property (not including out of service or back in service events). For example, if the last event reported for any unit has an effective date of 12/31/2021, the XML file must include only events with an effective date of 1/1/2022 or later.
6. If you are unsure of the latest effective date reported, run the Unit Event Summary Report. Make sure you cover a sufficient time period, so all units are represented (e.g., at least a full calendar year, assuming your reporting is up to date). Use the date you run the report as the end date.
7. A unique file and upload must be done for each property by D number. The XML file uploader cannot do batch uploads for multiple properties.

### 9.02 Uploading the XML File

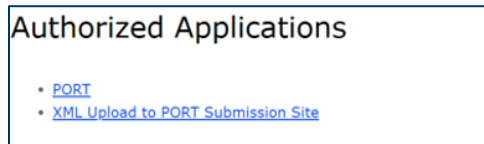
The XML file upload site can be accessed by all user roles. Tenant data may be uploaded monthly, quarterly, or annually; however, all reporting for the prior calendar year must be completed on or before the February due date, and any corrections made in property management software after an upload will require commensurate corrections in PORT.

Follow these steps to upload the XML file:

1. Log in with your username and password.
2. Click the **XML Upload to PORT Submission Site** hyperlink (not the PORT link) under Authorized Applications.

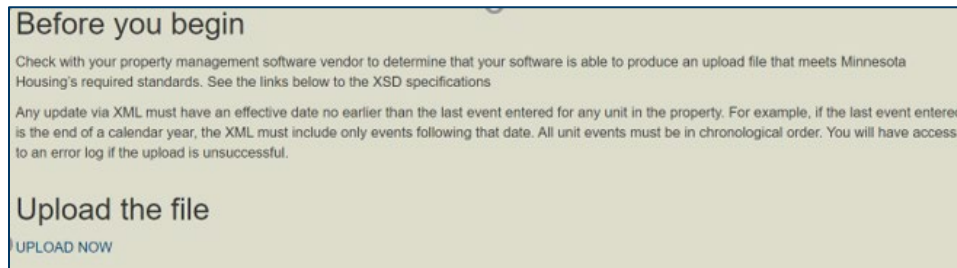


Figure 84: Location of XML Upload to PORT Submission Site Link



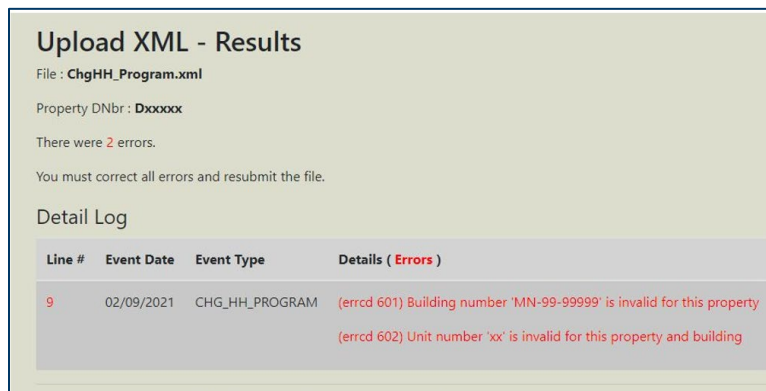
3. Click the **UPLOAD NOW** link.

Figure 85: Location of Upload Now Link



4. Follow the instructions on the next screen to select the XML file you wish to upload. Click the **Submit** button to complete the upload.
5. A message will display to indicate if the upload was successful.
6. If the XML did not follow Minnesota Housing's requirements, or the data did not conform to PORT requirements, no data will be uploaded, and an error log will display. Contact your software provider to resolve the noted errors before resubmitting.

Figure 86: Example of Error Message



## Exhibit A – Deferred Loan Certification Statements

Table 14: Deferred Loan Certification Statements

Certification Statement	Response Format	3rd Option	Additional Certification text	Help Text (as hyperlink)
All program-assisted units were rented to households that were properly income certified according to the certification requirements for the respective loan program(s), and assisted households met the applicable income limit(s)* at initial occupancy.	True/False	N/A	*and student status for properties with a HOME Written Agreement executed on or after 8/23/2013.	<i>Answer False if any part of the above statement is not true.</i>
No program-assisted households were charged a gross rent that exceeded the allowable rent limit(s).	True/False	N/A	N/A	N/A
Owner has maintained the applicable income, rent, and unit mix.	True/False	N/A	N/A	<i>Maintaining the applicable unit mix means renting the required number of units for the applicable income and rent restriction(s). For HOME properties, it also means renting the required number of high and low HOME units, and if the property has floating units, renting the required number of units by bedroom size.</i>
Owner completed an annual recertification of income* for all HOME and/or NHTF-assisted units following the requirements as stated in the HOME/NHTF Compliance Guide.	True, False, 3rd option	HOME affordability period has expired, or property does not have a HOME or NHTF loan from Minnesota Housing.	*and student status for properties with a HOME Written Agreement executed on or after 8/23/2013.	N/A

Certification Statement	Response Format	3rd Option	Additional Certification text	Help Text (as hyperlink)
Owner has not sold, transferred, or conveyed any portion of the property or Owner's interest in the property without obtaining prior written approval from Minnesota Housing.	True/False	N/A	N/A	N/A
Owner has obtained and maintains in force and effect the required insurance on the property. The insurance policies are endorsed with a standard mortgagee clause with loss payable to Minnesota Housing or shows Minnesota Housing as a named insured. Where appropriate, public liability, boiler, fire, extended coverage, burglary, and theft insurance are in force.	True, False, 3rd option	Property has no deferred loans with Minnesota Housing other than a HOME Rental Rehabilitation loan.	N/A	<i>Answer False if any of the statements are not true for the property.</i>
Name of Insurance Company	Enter name of insurance company	N/A	N/A	N/A
Policy Number(s)	Enter current policy number	N/A	N/A	N/A
Date Last Renewed	Enter mm/dd/yyyy of most recent renewal	N/A	N/A	N/A
Owner is in compliance with limits relating to its allowable return on the initial equity investment.	True, False, 3rd option	There is no Regulatory Agreement, or the Regulatory Agreement has no limit relating to Owner's return on equity.	N/A	<i>Select True if Regulatory Agreement has a limit on return on equity and Owner has not taken a distribution or has not taken a larger distribution than allowed.</i>

Certification Statement	Response Format	3rd Option	Additional Certification text	Help Text (as hyperlink)
				Select False if the Regulatory Agreement has a limit on return on equity and Owner has taken a larger distribution than allowed.
Each building and all program-assisted units in the property have been suitable for occupancy, taking into account the Department of Housing and Urban Development's (HUD) National Standards for Physical Inspection of Real Estate (NSPIRE) and applicable state and local health, safety, and other habitability codes, as well as any local ordinances and requirements.	True/False	N/A	N/A	Select False if, for more than one rental period during the certification year, there were uncorrected NSPIRE violations or violations of state and local habitability codes or local ordinances in any part of the property or if any units were out of service (e.g., due to tenant damage, fire, flood).
Property was physically inspected for a rental license, an operating license, and/or a board and lodge license, or by the city, a suballocator, the county, USDA Rural Development, or the Department of Housing and Urban Development (HUD) (not including Minnesota Housing inspections).	True/False	N/A	If True, submit a copy of the inspection report(s) or summary of violations (do not send inspection reports issued by Minnesota Housing). Include evidence that violations were corrected.	N/A
Property qualifies for the Low Income Rental Classification (LIRC property tax classification) and Owner has (re)applied for LIRC for the most current tax year.	True, False, 3rd option	Property does not qualify for LIRC.	N/A	Select False if property qualifies for LIRC but Owner did not submit a LIRC application or reapplication for the

Certification Statement	Response Format	3rd Option	Additional Certification text	Help Text (as hyperlink)
				most current tax year.
The property has not experienced vacancy issues during the certification year.	True/False	N/A	N/A	Answer False if the property is experiencing vacancy issues that are compromising the economic viability of the property and/or if you have been unable to re-rent one or more units for 90 days or more.
Owner has complied with all Occupancy Restrictions specified in Minnesota Housing's Declaration of Covenants, Conditions and Restrictions (e.g., marketing to families with children, renting the required number of units to long-term homeless [LTH], high priority homeless [HPH], people with disabilities [PWD]).	True, False, 3rd option	No loans that are the subject of this Owner's certification contain Occupancy Restrictions.	N/A	N/A
The property is in compliance with the Fair Housing Act, as amended, and the Minnesota Human Rights Act. There have been no violations of Fair Housing regulations, including accessibility guidelines, filed against the property within the certification year.	True/False	N/A	N/A	If False, submit copies of any Housing and Urban Development (HUD) Fair Housing and Equal Opportunity (FHEO) or Minnesota Department of Human Rights violation reports and/or an adverse final decision by the Secretary of HUD, an adverse final decision by a state or local fair housing agency, or an adverse judgment from a federal court, and evidence of corrective action.

<b>Certification Statement</b>	<b>Response Format</b>	<b>3rd Option</b>	<b>Additional Certification text</b>	<b>Help Text (as hyperlink)</b>
No tenants in program-assisted units were evicted or had their tenancy terminated (including not renewing a lease) other than for good cause.	True/False	N/A	N/A	Select False if you have evicted a household, terminated tenancy, or not renewed a lease for reasons other than a lease violation.
Owner has not refused to lease a program-assisted unit to an applicant based solely on their status as a holder of a Section 8 voucher.	True/False	N/A	N/A	N/A
Owner is otherwise in compliance with all applicable Minnesota Housing Regulatory Agreements, Loan Repayment Agreements and Mortgages, and/or Declaration of Covenants, Conditions and Restrictions and other lenders' loan documents that financed or encumber the property.	True/False	N/A	N/A	N/A

## Exhibit B – Housing Tax Credits Certification Statements

Based on the selection you made from the six options initially presented, only the relevant certification statements will appear.

Table 15: Housing Tax Credits Certification Statements

Certification Statement	Response Format	3rd option	Additional certification text
No buildings have been placed in service.	Radio button	N/A	N/A
At least one building has been placed in service, but Owner elects to begin credit period in the following year.	Radio button	N/A	N/A
The project meets the minimum requirement of:	N/A	N/A	N/A
The 20-50 test under Section 42(g)(1)(A) of the Code	Radio button	N/A	N/A
The 40-60 test under Section 42(g)(1)(B) of the Code	Radio button	N/A	N/A
The Average Income Test under Section 42(g)(1)(C) of the Code	Radio button	N/A	N/A
The project meets the minimum requirement of the 15-40 test for "deep rent skewed" projects under Sections 42(g)(4) and 142(d)(4)(B) of the Code	Radio button	Project is not subject to the 15-40 test for "deep rent skewed."	N/A
Project failed its required minimum set-aside	Radio button	N/A	N/A
The required applicable fraction has been met for each building.	True/False	N/A	N/A
At initial occupancy, Owner has received a Tenant Income Certification from each low-income resident and documentation to support that certification, and if applicable, at annual recertification, Owner has received a Tenant Income Certification and documentation to support that certification.	True/False	N/A	N/A
Each qualified low-income unit is rent restricted under Section 42(g)(2) of the Code.	True/False	N/A	N/A

<b>Certification Statement</b>	<b>Response Format</b>	<b>3rd option</b>	<b>Additional certification text</b>
All low-income units are for use by the general public and are used on a non-transient basis, except as otherwise permitted by Section 42 of the Code.	True/False	N/A	N/A
Owner has not refused to lease a unit to an applicant based solely on their status as a holder of a Section 8 voucher.	True/False	N/A	N/A
No tenants in low-income units were evicted or had their tenancies terminated (including non-renewal of lease) for other than good cause.	True/False	N/A	N/A
If a low-income unit in the project has been vacant during the year, reasonable attempts were or are being made to rent that unit to tenants having a qualifying income before any units were or will be rented to tenants not having qualifying income.	True/False	N/A	N/A
If the income of a low-income household increased above 140% of the applicable income limit at recertification, the next available unit in that building was rented to an income qualified household.	True, False, 3rd option	Project is 100% Housing Tax Credit (HTC) restricted and exempt from recertifying income.	N/A
The property is in compliance with the Fair Housing Act, as amended, and there have been no violations of the Fair Housing regulations, including accessibility guidelines, filed against the property within the certification year.	True/False	N/A	You must submit copies of any Department of Housing and Urban Development (HUD) or Minnesota Department of Human Rights violation reports and/or an adverse final decision by the Secretary of HUD, an adverse final decision by a substantially equivalent state or local fair housing agency, or an adverse judgment from a federal court and evidence of corrective action. Send to Minnesota Housing via Secure Upload Tool using this email address: mhfa.compliance@state.mn.us.



Certification Statement	Response Format	3rd option	Additional certification text
<p>Each building in the project is suitable for occupancy taking into account local health, safety, building codes, and National Standards for Physical Inspection of Real Estate (NSPIRE) as defined by the Department of Housing and Urban Development (HUD), and the state or local government unit responsible for building code inspections did not issue a report of a violation for any building or low-income unit in the project.</p>	True/False	N/A	<p>Select False if, for more than one rental period during the certification year, there were uncorrected NSPIRE violations or violations of state and local habitability codes or local ordinances in any part of the property or if any units were out of service. Submit a copy of the violation report and evidence of Owner's corrective action. Send to the assigned Compliance Officer via the Secure Upload Tool using this email address: mhfa.compliance@state.mn.us.</p>
<p>The property has not suffered a casualty loss resulting in the displacement of residents for more than one rental period.</p>	True/False	N/A	<p>If False, submit an explanation with this certification for casualty loss associated with any building exterior, common area, or mechanicals, along with a description of the circumstances and date of the casualty loss. Unit(s) Out of Service for more than one rental period and Back in Service (date on which the unit was suitable for occupancy) must be reported in PORT. Send to the assigned Compliance Officer via the Secure Upload Tool using this email address: mhfa.compliance@state.mn.us.</p>

Certification Statement	Response Format	3rd option	Additional certification text
An extended low-income housing commitment as described in Section 42(h)(6) of the Code is in effect (Extended Use Agreement), including the requirement under Section 42(h)(6)(B)(iv) of the Code that Owner cannot refuse to lease a unit in the project to an applicant because the applicant holds a voucher of eligibility under Section 8 of the United States Housing Act of 1937. Owner has complied with all warranties, covenants, and representations contained in the Extended Use Agreement.	True/False	N/A	N/A
Owner received a Credit allocation from the portion of the state ceiling set-aside for a project involving “qualified nonprofit organizations” under Section 42(h)(5) of the Code, and the nonprofit entity materially participated in the operation of the development within the meaning of Section 469(h) of the Code.	True, False, 3rd option	Property did not receive its credit allocation from the nonprofit set-aside.	N/A
There has been no change in the ownership or management of the property that has not been reported to Minnesota Housing.	True/False	N/A	N/A
The property is in compliance with the Violence Against Women Act (VAWA) requirements and all related implementing regulations providing protections for residents and applicants who are victims of domestic violence, dating violence, sexual assault, and/or stalking.	True/False	N/A	N/A
There has been no change in the applicable fraction as defined in Section 42(c)(1)(B) of the Code for any building in the project.	True/False	N/A	N/A
Owner has received an annual Student Certification for each low-income household.	True/False	N/A	N/A

Certification Statement	Response Format	3rd option	Additional certification text
There have there been no changes in the eligible basis under Section 42(d) of the Code for any building in the project.	True/False	N/A	N/A
All resident facilities included in the eligible basis of any building in the project are provided on a comparable basis without a separate fee to all residents in the building.	True/False	N/A	N/A
If the income of a low-income household increased above the limit allowed in Section 42(g)(2)(D) of the Code, all next available units of comparable or smaller size in that building were rented to an income qualified household.	True/False	N/A	N/A
Pursuant to IRS Revenue Ruling 2004-82, Owner has not evicted any resident, or refused to renew any lease, except for good cause.	True/False	N/A	N/A
Owner continues to comply with all terms agreed to in the application for Credit authority, including all federal and state-level program requirements and any commitments for which points or preferences were received.	True/False	N/A	N/A
This property is subject to monitoring and inspections, including physical inspections and tenant file reviews for the Department of Housing and Urban Development (HUD) Project-Based Section 8 or the United States Department of Agriculture (USDA) Rural Development programs.	Radio button	N/A	N/A
This property is NO LONGER subject to monitoring or inspections for the Department of Housing and Urban Development (HUD) Project-Based Section 8 or the United States Department of Agriculture (USDA) Rural Development programs.	Radio button	N/A	N/A

Certification Statement	Response Format	3rd option	Additional certification text
Date of last Management and Occupancy Review (MOR) for Project-Based Section 8 or United States Department of Agriculture (USDA) Supervisory Visit.	Enter mm/dd/yyyy of last MOR or Supervisory Visit	N/A	N/A
Date of last Real Estate Assessment Center (REAC) or United States Department of Agriculture (USDA) physical inspection.	Enter mm/dd/yyyy of last REAC or USDA physical inspection	N/A	N/A