



**ALABAMA HOUSING
FINANCE AUTHORITY**

Come on home, Alabama.

Alabama Housing Finance Authority's DMS MultiFamily Online Application Instructions

Reference Documents:

HOME Action Plan and

Housing Credit (HC) Qualified Allocation Plan

www.ahfa.com



General Information

The Multifamily Funding Application includes an Online Application that is Mandatory. The Online Application will be posted on AHFA's website at www.ahfa.com. All applicants must electronically submit the Online Application to AHFA. Prior to submitting the Online Application, applicants should review the data for accuracy, print each page for purposed of creating a PDF of the Online Application for submission to AHFA and maintain a copy for your records. Once the Online Application is submitted through the electronic system, the application will be locked and no further changes or corrections will be allowed. The electronic submission must be made before a hard copy of the Online Application with the AHFA-provided and third-party forms are delivered to AHFA's offices.

Applicants should maintain supporting documentation used in completing the application for future reference. If it becomes necessary, AHFA will post updates, changes, or technical corrections to www.ahfa.com during the application cycle.



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Prerequisites for DMS Online Application

Complete the following steps prior to beginning the DMS Online Application:

1. Applicant must register in the Authority Online Management System. (See Authority Online User Registration Guide for details.)
2. Affiliate all organizations, project contacts, and team members. (See Authority Online Affiliate Organizations User Guide.)
3. Complete and review all third-party documents and AHFA provided forms.

Instructions Overview – Fill out each page as directed, complete all items. Saving before adding or updating may generate an error message or may not hold the data. When completing a number field, be mindful of your cursor location relative to the decimal.

The following pages contain special instructions for items which require a more detailed explanation.



User Access

Step 1: In the **User Access** tab, enter an individual's email address and select SEARCH. If the individual is listed in DMS, the information will populate on the screen. If the individual is not in DMS, they will need to be added to the system as a contact.

The screenshot shows the 'User Access' interface. At the top, it says 'User Access' and 'Allows you to grant access to this application to users not in your organization'. Below this is an 'Add User' section with a text input field and a 'Search' button. Below the search section is a table with two columns: 'User Name' and 'Email Address'. The table contains one row with the user 'Tyler Hunt' and email 'thunt@ahfa.com'. To the right of the email address is a 'Select' button.

User Name	Email Address
Tyler Hunt	thunt@ahfa.com

Step 2: Select a user permission. **View** or **Edit** permissions may be assigned to this user for this specific application. Selecting **Edit** will allow the user to make changes to the application. Selecting **View** will allow the user to review the application but make no changes.

The screenshot shows the 'User Access' interface in the 'Edit User' section. It displays the user's details: 'User Name: Tyler Hunt' and 'Email Address: thunt@ahfa.com'. Below this is a 'Permission:' label followed by a dropdown menu. The dropdown menu is open, showing three options: 'View', 'View', and 'Edit'. The first 'View' option is highlighted. At the bottom left of the form are 'Save' and 'Cancel' buttons.



User Access

Step 3: Select **Save**. The user is added to the list and has permission to view or edit the specific application.

User Access

Allows you to grant access to this application to users not in your organization

Add User

User Name	Email	View/Edit	Linkage	
Test Architect out of state	jperry@ahfa.com	Edit	Organization	
Chris Hert	chert@ahfa.com	Edit	Direct	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Tyler Hunt	thunt@ahfa.com	Edit	Direct	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Ronald Persons	adfadmstest@yahoo.com	View	Direct	<input type="button" value="Edit"/> <input type="button" value="Delete"/>



General Project Information

- **District Lookup** – To avoid losing data, open the District Lookup link in a new window by simultaneously pressing the CTRL key while selecting the applicable link.
- **Development Activities** – Select and “Add” all development activities that apply.

Type of Development Activities Planned

Rental - New Construction

- **Type of Rental Structure** – Standard Rental must be selected.

Type of rental structure:



Applicant / Developer

- **Developer Information** -The Applicant/Developer is the entity responsible for filling out the online application; this entity may or may not be involved in the ownership of the project. This is the entity that must affiliate the organizations that will populate the Development Team Members Tab.
- **Authorized Signatory/Contact** – These dropdown boxes are populated by the contacts provided when the entity was originally registered in the AHFA Online Management System. Additional signatories and contacts may be added by the organization administrator.
- **Date of Formation** – This field is populated from the information provided when the entity was originally registered in the AHFA Online Management System. This information may be added by the organization administrator.



Owner

- **Ownership Entity** – Typically the project ownership entity will be created by electing “New Organization” from the dropdown box. From there fill out the information as directed. * If the ownership entity has already been created, select the appropriate entity.

A screenshot of a web form field. The label "Ownership Entity" is on the left. To its right is a dropdown menu with a blue background and white text that reads "(New Organization)". A small downward-pointing arrow is visible on the right side of the dropdown box.

- **Authorized Signatory/Contact** – These dropdown boxes are populated by the contacts provided when the entity was originally registered in the AHFA Online Management System. Additional signatories and contacts may be added by the organization administrator.



E. Development Team Members

Development Team Members – Prior affiliated development team members will appear in the dropdown box. A development team member may also be added directly into the online application by selecting the **“Add Partner”** button and entering the organization code. If an organization does not appear in the Organization Name dropdown box, select **“Show All”** to see all entities that have been affiliated. *The appropriate role must have been selected when the organization was registered in the AHFA Online Management System.

- **Government/Historical Society Contacts** – Multiple government/historical society contacts should be added by using the **“Add”** button.

Government/Historical Society Contacts

Contact Roles:
Local Historical Contact

Title:

First Name: Last Name:

Address:

City:

- **Tax Exempt/Syndicator** contacts may be added manually without affiliating an organization.



Non-Profit / CHDO

- **Name** – Non-Profit/CHDO must be previously affiliated to appear in the dropdown box.
- **Authorized Signatory/Contact** – These dropdown boxes are populated by the contacts provided when the entity was originally registered in the AHFA Online Management System. Additional signatories and contacts may be added by the organization administrator.

Non-Profit Set-Aside and Historic Preservation



- Page to be completed if you wish to be considered under the Non-Profit set-aside or qualify for Federal or State Historic Credit.



Site Information

To avoid losing data, information must be added before saving. If there are multiple sites or sellers, the information will need to be completed for each. ***Before Submitting** the application online, the **Site(s) Information** located in the summary will need to be printed separately and inserted into the final printed application.

Site Information Summary

Click to add site information record, information entered must be added before information may be saved.

	Address	City	County	Purchased Acres	Proposed Acres	Purchase Price	
Site Name 1	asdhjfdhhasdfkhj	Montgomery	Montgomery	5.500	5.500	\$125,000.00	<input type="button" value="Delete"/>

- **Miscellaneous Site Information** – In the case of multiple sites, the data entered last in the Miscellaneous Site Information portion will be the information that is saved in the system; therefore, the Miscellaneous Site Information for each site will need to be completed and printed.



Buildings and Buildings Summary

To avoid losing data, information must be added before saving. If there are multiple buildings, the information will need to be completed for each.

***Before submitting** the application online, the Building(s) Information will need to be printed separately and inserted into the final printed application. When using the copy button, be sure the information is correct for the specific building.

To copy the attributes of a previously completed building to a new building, click on the specific building within the grid and select 'Copy'.

Building Name / Address	Date Last Placed in Service	Planned or Actual Acquisition	Years Between
Building 1 - 100 Commerce Way, Montgomery			N/A
Community Building/Laundry - ,			N/A

- **Existing Building Information** – In the case of multiple buildings, the data entered last in the Existing Building Information portion will be the information that is saved in the system; therefore, Existing Building Information for each building will need to be completed and printed.



Project Rental Information

To avoid losing data, information must be saved before leaving the page.

The Project Rental Information page is used to complete the unit type and rental information for the Project. Up to 12 different unit types may be selected, if your project exceeds 12, please contact AHFA directly to discuss.

A	B	C	D	E	F
PROJECT RENTAL INFORMATION					
Residential Unit Summary					
Rent Level	60%	▼	60%		
Bedroom Size (change in dropdown)	1 Bedroom	2 Bedroom	3 Bedroom		
Maximum Allowable Rents:	1100.00	1200.00	1300.00		
Subsidy amount (if applicable)					
Rents Charged (including subsidy if applicable):	1000.00	1100.00	1200.00		
Less Utility Allowance:	100.00	150.00	175.00		
Net Collectable Rents:	\$900	\$950	\$1,025	\$0	\$0
Percentage Rents of Max. Allowable:	91%	92%	92%	0%	0%



Architect Certification Information

To avoid losing data, information must be saved before leaving the page.

The Architect Certification Information page should match in all respects to the New Construction/Rehabilitation Square Footage Architect’s Certification form also submitted with the application.

The following information refers to (select one):

(Duplicate this page for information regarding the type of units not checked above.)

Type:	# of Units:	# of Baths:	Bedroom Sq. Foot:				Heated Area:	Total Heated Area:
			1st B/R	2nd B/R	3rd B/R	4th B/R		
1 Bedroom	10	1	110	100			1000 s.f.	10000 s.f.
2 Bedroom	10	2	110	100			1100 s.f.	11000 s.f.
3 Bedroom	10	3	110	100	100		1200 s.f.	12000 s.f.
Bedroom							s.f.	s.f.
Bedroom							s.f.	s.f.



Tenant Services and Amenities

- To avoid losing data, information must be added before saving.
- Amenities must match what is provided in the Square Footage Architect Certification provided by the architect.

Utility Allowance - Complete the page as instructed.

Contractor Costs New Construction - Complete the page, and be sure to save all work. Verify that all amounts are correct.

Contractor Costs Rehabilitation - Complete the page, and be sure to save all work. Verify that all amounts are correct.

Total Development Costs

- Complete the page, and be sure to save all work.
- The Tax Credit Reservation fee is calculated on the number of credits requested in the LIHTC and Historic Tax Credit portion of the Funding Source tab.
- Verify that all amounts are correct.



Annual Operating Expense, Taxes & Insurance - Complete this screen to show the expected operating expenses.

Miscellaneous Income - To avoid losing data, information must be added before saving.



Funding Sources

Complete the page as instructed. Add all financial type(s) that pertain to your project.

- **LIHTC and Historic Tax Credit** – The “Add” button must be selected to enter the Federal LIHTC and Historic tax credit amounts. Verify amounts entered are calculated correctly.

Program	Credits Requested	Price per Credit	Ownership Percentage	Total Proceeds	Description
Federal LIHTC	\$100,000	.9200	99.990%	\$919,908	

- **State Permanent Financing** – Specifically pertains to the requested AHFA HOME funds.
- **Local Participating Jurisdiction HOME Financing** – If receiving HOME funds from a local Participating Jurisdiction, select the local Participating Jurisdiction which applies. * Do not select the HOME or HOME CHDO election in this dropdown.

	Lien Position	Amount
3rd	250,000	

Is the Participating Jurisdiction covered by a local Consolidated Plan?



Subsidies

This page must be completed for any subsidy or regulatory requirement; which are currently in place.

- **Development Plan** – “Yes” or “No” must be selected for the Development Plan Question, it cannot remain blank.

Development Plan

Does your development plan include units with existing subsidies or regulatory requirements? ▾

- **Project Rental Assistance** – “Yes” or “No” must be selected, it cannot remain blank.

Project Rental Assistance

Do you expect to receive or are you currently receiving any rental subsidies for this development?



Pro-Forma - Data for the pro-forma calculated from previously entered information in the operating expense budget, unit information, miscellaneous income, and subsidies.

***Print these on three (3) pages, only a limited number of years (approximately 7 per page) will print at one time, the cursor must be moved to get the entire page to print.**

Tax Credit Elections and Public Housing Authority Information - Answer all questions to complete the page.

Relocation Information - Must be completed by all rehabilitation projects and new construction if applicable.

Tax Exempt Bond Financing - Regardless of type of financing structure, all questions must be completed including amounts.

Tax- Exempt Bond Financing			
Type of Bonds	Amount	Interest Rate	Term
Series A Tax Exempt Bonds	0	0	0
Series B Tax Exempt Bonds	0	0	0
Taxable Bonds	0	0	0
Total Issuance:	0		

Development Schedule - Specify the requested milestones dates for the project. Please be as realistic in your assumptions as possible.



Document Upload

Document Upload - Upload documents directly to DMS Online

Step 1: Select the **Document Upload** tab from within the Online Application.



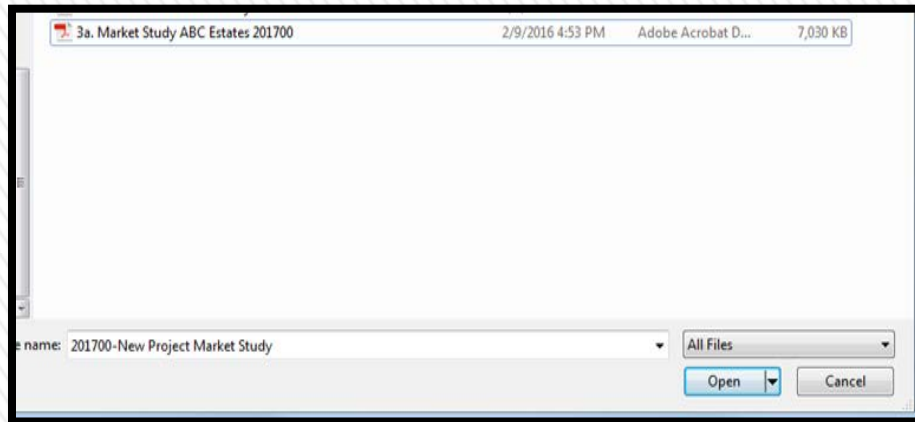
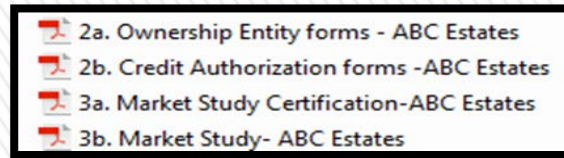
Step 2: Select **Choose File** function to browse for the document.

A screenshot of the 'Document Upload' form interface. The form includes the following elements: a title 'Document Upload', a list of accepted file extensions (tiff, tif, doc, docx, xls, xlsx, jpeg, jpg, pdf, msg), a maximum file size of 25600 KB, an 'Upload Document' label with a 'Choose File' button and the text 'No file chosen', a 'Document Type' dropdown menu, and an 'Upload Document' button at the bottom right.



Document Upload

Step 3: Browse for the file to upload. *NOTE: Upload documents should be labeled using the Digital Copy format provided in the Application Instructions.*



Double Click the selected file on your device. It will appear in the **Document Upload** page.

Step 4: Choose the appropriate **Document Type** (Market Study / Environmental / Capital Needs Assessment). This ensures the document uploads to the correct location for viewing by AHFA.



Document Upload

Document Upload

Accepted File Extensions: tiff, tif, doc, docx, xls, xlsx, jpeg, jpg, pdf, msg

Max File Size: 25600 KB

Upload Document 3a. Market Study...ates 201700.pdf ←

Document Type ▼ ←

Note: Maximum document size is 25,000 Kilobytes (25 Megabytes). Documents exceeding this size must be broken into smaller documents and uploaded individually. Clearly identify related documents by adding *part 1, part 2, etc.*

Step 5: Correctly uploaded documents will display on the screen.

Document Name	Document Date
View 3a. Market Study ABC Estates 201700	1/3/2017 2:19:22 PM

NOTE: Documents cannot be deleted by the applicant. Notify AHFA in the event of errors or needed corrections.



Validation and Submission

During the validation process, if errors are found, the information must be corrected in order to complete and submit the application.

- **Application Submission – Once the validation is complete, manually change the selection from application pending to application submitted in the dropdown box before pressing the submit button. **Once the application is submitted, the application will lock and edits will no longer be allowed.***

A screenshot of a web form for application submission. It features a dropdown menu with two options: "Application Pending" (highlighted in blue) and "Application Submitted" (in grey). To the right of the dropdown is the text "Please specify the stage that you are submitting this application:". Below the dropdown is a blue "Submit" button.

Application Pending
Application Submitted

Please specify the stage that you are submitting this application:

Submit

Print



Print from either **Chrome**  or **Firefox**  browsers

Print Receipt - Print receipt will not be available until after application submission.

***How to Print the Application** - Once the application has been validated and submitted, the application should be printed.

Do not use Internet Explorer as a browser when printing the Online Application, Google Chrome is the preferred internet browser. All Online Application specific tabs (items) must be printed individually. Specific tabs (items) consolidate the data and must be opened and printed separately. (i.e. Site information, Buildings, and Unit Summary tabs (items). The Pro Forma tab (item) exceeds the screen width and must be printed on multiple pages. Please keep a printed paper copy of each tab (item) for your records and submit a printed paper copy of the Online Application to AHFA.



AHFA Point of Contact

Any questions regarding the DMS MultiFamily Online Application Instructions should be submitted via email to: ahfa.mf.dms@ahfa.com

This document is not intended to usurp, conflict, or supplant the requirements identified in the AHFA HOME Action Plan or AHFA HC Qualified Allocation Plan.