



**CHART PY2022: Now in your Secure Management Folder
Due Wednesday, February 15, 2023**

Hello and Happy Holidays! This is to let you know that the CHART shells that you will use for PY2022 reporting are available in your secure management folder. Along with the CHART2022 shells, we uploaded a blank CHART Authorization, a blank Certification of Material Participation of Nonprofit, and an updated CHART User Guide. You will also find instructions for uploading your annual reporting documents and specific guidance for HTC12 and first year reporting.

The annual Owner's Certification of compliance with supporting PY2022 CHART, CHART Authorization, Certification of Material Participation of Nonprofit (if applicable), as well as PY2021 and PY2022 Utility Allowance supporting documents for each project must be received by AHC by close of business Wednesday, February 15, 2023.

1. **CHART 2022 shells:** Please download the CHART shell(s) to your hard drive and save one for each project that reports to AHC. **The CHART shells are in the *CHART Template* folder.**
 - a. **CHART2022** is to be used for the following two types of projects:
 - i. Projects with tax credits issued by a Suballocator for which AHC conducts compliance monitoring.
 - ii. Projects with tax credits *and* HOME issued by a Suballocator for which AHC conducts compliance monitoring.
 - b. **CHART2022-HOME Only** is to be used for the following type of project:
 - i. All HOME projects that *do not* have tax credits issued by a Suballocator but that contracts with AHC for monitoring.
 - c. **CHART2022-HTC12 Only** is to be used by the following types of projects:
 - i. Projects with either a 42m letter or Carryover letter issued prior to 12/31/22 must report with both an HTC12 and an HTC12 Only CHART, whether or not placed in service.
 - ii. Projects with tax credits issued by a Suballocator for which AHC conducts compliance monitoring and have *no* buildings placed in service in 2022.
 - iii. Projects with tax credits with *at least one* building placed in service in 2022 but owner elected to *not* claim credits in 2022.
2. **CHART Authorization:** One blank CHART Authorization is in your secure folder. Please download to your hard drive and save one for each project that reports to AHC. The CHART Authorization is in the ***CHART Authorization*** folder.
 - a. Print one CHART Authorization for each project in your portfolio, have the owner representative for each project complete, sign and date it. Scan and upload the signed version to your secure folder. The CHART Authorization must be returned with the completed PY2022 CHART. We will not begin a review of your reports without the CHART Authorizations, which could result in findings of noncompliance.
 - b. The Owner and Management information provided in the CHART Authorization should be the same as what appears on the Project's PY2022 CHART unless there has been a change. In that case, this must be noted on the Annual Owner Certification and the appropriate documentation must be submitted. If the Project is not a first-year project, this information should be the same as what appears on the Project's final PY2021 CHART that AHC uploaded to your secure folder. Please see the Project tab for the



correct Project Name (line 5), authorized Owner Rep (lines 14 and 15) and Legal Owner Entity (line 17). Also, be sure to indicate in the “Title” line of the signature block the relationship between the authorized owner representative and the legal owner entity. If there is/was a change in ownership or management, please notify AHC via form HTC-27 and complete the appropriate section(s) of the project’s PY2022 HTC-12 and/or HOME Owner’s Cert.

3. **CHART User Guide PY2022:** The CHART User Guide was updated and revised to make it more useful and user friendly. The CHART User Guide is in the **CHART User Guide** folder. Additional instructions and guidance for completing the Owner Certifications and for first year projects are also in this folder.
4. **Final PY2021 CHARTs:** The final PY2021 CHARTs have been uploaded to your secure folder. The final PY2021 CHART of each project will assist with populating the PY2022 CHART shell. Final PY2021 CHARTs are in the **PY2021** folder in the **CHARTs FINAL** folder.

We anticipate conducting site visits (tenant file reviews) in 2023 as we did in 2022. However, we do anticipate that UPCS inspections will be in person. If current conditions change, we will let you know.

For those with projects due for a site visit due in 2023, please look at your calendars and notify AHC **as soon as possible of dates that will NOT work for you and/or your staff in 2023.**

Please note the final IRS regulations reduced the BLD notice from 30 days to 15 days and prohibit including a list of units selected for review. Because of this reduced notice, it is crucial that a site visit occur once it is scheduled. Site visits that need to be rescheduled due to lack of preparation will be considered noncompliant and will incur an additional fee.

Please feel free to contact Stephanie Newburg (stephanie@ahcinc.net) or Jennifer Arens (jennifer@ahcinc.net) if you have any questions or concerns.

Thank you for your continued cooperation. We look forward to working with you in 2023!