Tenant Data Collection Form Instructions

To begin, save the Tenant Data Collection Form in Excel on your computer. The form can be found at the following web link http://www.ihfa.org/ihfa/housing-compliance/tax-credit-home-forms-and-guidance.aspx. Next, rename the form with the property name that you will be completing the form for. Each form must have its own, unique file name. Example: GreenMeadow.xls. All columns, except the Race, Ethnicity, and Disability Status, must be completed for each unit. If a unit is vacant, or currently off-line, use the previous household data. Round all digits to the next whole number when entering numbers, do NOT use decimals. Each tab must contain information on all units. Do not create additional tabs.

Tab 1 – Tenant

Column A – If the current certification for the unit is an Initial enter 1 for YES or 2 for NO
Column B – If the current certification for the unit is a Re-Certification enter 1 for YES or 2 for NO
Column C – Since IHFA does not recognize "other" certifications this column will always be 2 for NO
Column D – With there being no "other" certification type, this column will always be NONE
Column E – List the Effective Date of the current certification in a MM/DD/YYYY format
Column F – List the Move-In Date of the household in a MM/DD/YYYY format
Column G – Enter the Property ID Number, which will be in the format of HC, followed by 4 digits Ex. (HC0012)
Column H – Enter the Building ID Number, which will be in the format of ID, followed by 7 digits Ex. (ID9800018)
Column I – List the unit number (this can be letters and numbers)
Column J – List the number of bedrooms in the unit, (this must be numbers only, put 0 for a studio)
Column K – If the unit is currently vacant, enter 1 for YES and 2 for NO (previous household's information
             must be used to complete the rest of the columns)
Column L – List the Effective Date of the current certification in a MM/DD/YYYY format
Column M – List the current household size (numbers only)
Column N – List the current income limit from the certification (numbers only)
Column O – List the income limit at move in from the certification (numbers only)
Column P – List what the household size at move in was (numbers only)
Column Q – List the units income percentage (numbers only, do not enter % sign Ex. 60% should be listed as 60)
Column R – List what 140% of the current income limit is (numbers only)
Column S – If the household income exceeds 140%, enter 1 for YES or 2 for NO
Column T – Enter the tenant paid rent (numbers only)
Column U – Enter the household rental assistance amount, if applicable. If none enter 0 (numbers only)
Column V – Enter the utility allowance for the unit, if none enter 0 (numbers only)
Column W – Enter any non-optional charges, if none enter 0 (numbers only)
Column X – Enter the gross rent. Gross rent is the tenant rent + utility allowance + non-optional charges
             (numbers only)
Column Y – Enter the unit rent percentage (numbers only, do not enter % sign Ex. 60% should be listed as 60)
Column Z – Enter the rent limit for the unit (numbers only)
Column AA – List if the unit is comprised of all full time students, 1 for YES 2 for NO
Column AB – Enter exemption numbers 1-5 or 9 for no exemption
             1 = TANF Assistance
             2 = Job Training Program
             3 = Single parent/dependent child
             4 = Married/joint return
             5 = Former foster child
             9 = No exemption
Column AC – List if the unit is Tax Credit, 1 for YES or 2 for NO
Column AD – List if the unit is a HOME, 1 for YES or 2 for NO

Column AE – If the unit is a HOME unit, list the applicable percent: 1 for 50% or less, 2 for 60%, 3 for 80%, and 4 for OI (over-income)

Column AF – List if the unit is Tax Exempt, 1 for YES or 2 for NO

Column AG – If the unit is Tax Exempt list the applicable percent: 1 for 50%, 2 for 60%, 3 for 80%, 4 for OI (over income)

Column AH – List if the unit is (Affordable Housing Disposition Program) AHDP, 1 for YES or 2 for NO

Column AI – If the unit is AHDP list the applicable percent: 1 for 50%, 2 for 60%, 3 for 80%, 4 for OI (over income)

Column AJ – List if the unit has another program, 1 for YES or 2 for NO

Column AK – If there is another program, type the name (text only – no numbers)

Column AL – Enter the income status for the other program (numbers only)

Tab 2 – Household Composition

Column A – Enter the Property ID Number which will be in the format of HC, followed by 4 digits Ex. (HC0012)

Column B – Enter the Building ID Number which will be in the format of ID, followed by 7 digits Ex. (ID9800018)

Column C – Enter the unit number (can be both letters and numbers)

Column D – Enter the household member number as ordered on the TIC (numbers only)

Column E – Household members last name (text only)

Column F – Household members first name (text only)

Column G – Household members middle initial (text only)

Column H – Relationship to head of household (H, S, A, O, C, F, L, N)

> H = Head of Household
> S = Spouse
> A = Adult Co-Head
> O = Other Family Member
> C = Child
> F = Foster Child(ren)
> L = Live-in Caretaker
> N = None of the Above

Column I – Date of Birth, list in the format of DD/MM/YYYY

Column J – Is the household member a full time student, 1 for YES or 2 for NO

Column K – List the last four digits of the household members Social Security Number. If household member does not have a SS# use the household members birth month and year. Example: January, 1956 would be listed as 0156

Column L – List the household member ethnicity, 1 for Hispanic or Latino 2 for Non-Hispanic or Latino

Column M – List if the household member is disabled, 1 for YES or 2 for NO

Tab 3 – Race

Column A – Enter the Property ID Number which will be in the format of HC, followed by 4 digits Ex. (HC0012)

Column B – Enter the Building ID Number which will be in the format of ID, followed by 7 digits Ex. (ID9800018)

Column C – Enter the unit number (can be both letters and numbers)

Column D – Enter the household member number in the order listed on the TIC

Column E – Enter the race for each household member (numbers 1-5 or 9 for no answer)

> 1 = White
> 2 = Black/African American
> 3 = American Indian
> 4 = Asian
> 5 = Native Hawaiian/Pacific Islander
> 9 = No answer

Tab 4 – Gross Annual Income

Column A – Enter the Property ID Number which will be in the format of HC, followed by 4 digits Ex. (HC0012)
Column B – Enter the Building ID Number which will be in the format of ID, followed by 7 digits Ex. (ID9800018)
Column C – Enter the unit number (can be letters and numbers)
Column D – Enter the household member number in the order listed on the TIC
Column E – Enter any employment wages per household member (round to the nearest whole number)
Column F – Enter any Social Security and/or pension income per household member (round to the nearest whole number)
Column G – Enter any public assistance per household member (round to the nearest whole number)
Column H – Enter all other income per household member (round to the nearest whole number)

Tab 5 – Income from Assets

Column A – Enter the Property ID Number which will be in the format of HC, followed by 4 digits Ex. (HC0012)
Column B – Enter the Building ID Number which will be in the format of ID, followed by 7 digits Ex. (ID9800018)
Column C – Enter the unit number (can be letters and numbers)
Column D – Enter the household member number in the order listed on the TIC
Column E – List the type of asset (text only)
Column F – Enter 1 for current or 2 for imputed
Column G – Enter the cash value of the asset (round to the nearest whole number)
Column H - Enter the annual income from the asset (round to the nearest whole number)