USER GUIDE FOR DHCD'S WEB-BASED DATA REPORTING SYSTEM



I. Purpose

The Department of Housing and Community Development (DHCD) has developed a Web-Based Data Reporting System in response to Chapter 334 of the Acts of 2006 ('the Act"). DHCD, MassHousing, Massachusetts Housing Partnership (MHP) and MassDevelopment are using this System to collect data required by the Act and by DHCD regulations at 760 CMR 61.00. The Act provides for the gathering, compiling, and reporting of data by DHCD to provide current, accurate, and detailed information on the number, location, and residents of assisted housing units and recipients of state or federal assistance in the Commonwealth.

DHCD will annually report to the state legislature on its data collection efforts and results by December 31st, and may provide reports to other interested parties in a manner consistent with all applicable privacy laws. DHCD also will evaluate the data as part of its efforts to affirmatively further fair housing. More specifically, DHCD will analyze the data to ensure that housing choice, equitable housing opportunities, and inclusive patterns of housing are available across the Commonwealth.

II. Applicability

All rental projects that have received state or federal funding administered by the state are required to report on the affordable units using the web-based system. State and federal funding administered by the state is funding received through the Department of Housing and Community Development, Massachusetts Housing Partnership Fund, MassHousing, or MassDevelopment. Such funding includes (project based) Section 8 administered by MassHousing and capital subsidy programs. See below for a listing of applicable capital subsidy programs by agency.

DHCD	MassHousing	MassDevelopment	MHP
Housing Innovation Fund	4% Low Income	4% Low Income Housing	MHP Loan
(HIF)	Housing Tax Credit (4%	Tax Credit (4% LIHTC)	
	LIHTC)		
HOME	MassHousing Tax	MassDevelopment Tax	
	Exempt Financing	Exempt Financing	
Housing Stabilization Fund	Section 13A Interest	MassDevelopment Direct	
(HSF)	Subsidy	Loan	
9% Low Income Housing Tax	Section 236 Interest		
Credits (9% LIHTC)	Subsidy		
Facilities Consolidation Fund	MassHousing Taxable		
(FCF)	Financing		
Capital Improvement and	Priority Development		
Preservation Fund (CIPF)	Fund (PDF)		
Transit Oriented Development	SHARP		
Fund (TOD)			
MA State Low Income	RDAL		
Housing Tax Credit (SLIHTC)			
Affordable Housing Trust	Options Program		

Fund (AHTF)		
Commercial Area Transit	DPH	
Node Housing Program		
(CATNHP)		
Community Based Housing	DTA	
(CBH)		
	McKinney	

Contact information by agency:

Please direct your questions to the following persons:

DHCD: Office of the General Counsel (617) 573-1501

MassHousing: Tanisha Perkins (617) 854-1892

Massachusetts Housing Partnership: Tom Hopper (617) 330-9944, ext. 348

MassDevelopment: Tony Fracasso (617) 330-2024

III. Confidentiality Requirements

In connection with data collection and reporting, all holders of information relating to a specific resident or unit shall treat such information as confidential in compliance with all applicable state and federal statutes and regulations, including M.G.L. c. 66A. All holders of said information shall implement adequate systems and procedures for maintaining confidentiality.

IV. When Data Shall be Collected

Data on the affordable units (not market rate units) in the project shall be collected by project sponsors/developers or borrowers and/or their designated delegates upon initial occupancy, turnover, and rent re-determination/recertification. The data collection period will be commensurate with length of the longest term of subsidy applicable to the project.

<u>Please note</u>: although all of the required data may not currently be collected, you MUST collect the data going forward. This includes revising your initial occupancy and rent re-determination/re-certification documentation to collect the data and provide notice to the household that the data will be provided to DHCD.

V. When Data Shall be Reported

Data shall be submitted to DHCD by September 30th of each year, reflecting occupancy statistics that exist in your files *as of* July 31st of that year. DHCD has introduced a "roll over" feature to the System so that most data from the previous reporting year is available for the current reporting year without having to be reentered; such data may also be updated prior to submitting the report for the current year.

VI. <u>Data Collection Restrictions</u>

Any and all inquiries made on the basis of race, ethnicity, and age must include notice that responses are *voluntary*. See DHCD's Resident Notice and Consent Form for suitable language, available at:

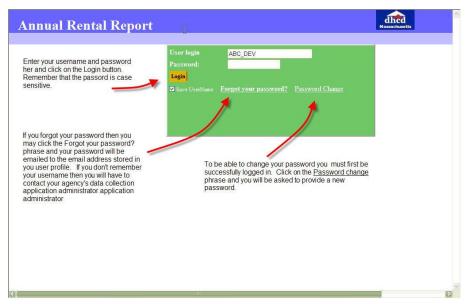
https://hedhsgdevannualreport.azurewebsites.net/

Accessing The WEB System

DHCD will create a single username and password for each company assisting us in this data collection effort. This will be your administrative login with which you may create and maintain user access for staff within your company. It is recommended that a unique login be created for each person using this system.

When you have received your administrative login you may access the webbased system at the following web address:

https://hedhsgdevannualreport.azurewebsites.net/



Once you have successfully logged in to the web-based system a "Project List" screen will appear that displays the projects that you are being asked to report on. You also will see your company's name (e.g.

ABC_Development) and the year that is being reported on (e.g. 2015). If you are your company's system administrator you will see two additional buttons.



Update/Create Users

This button enables you to create additional users within your company. Each user of the system should have a unique username and password.

Delegate reporting responsibility

This button may be used by sponsor/owners to delegate reporting responsibility to a management company. Management companies typically collect and maintain the data being requested.

Both the creation of user accounts and the delegation to a management company will be explained in detail below.

Fields listed include the following:

- Select Report Year: Select report year for data entry.
- <u>Sponsor/Owner</u>: Current sponsor/owner (includes developer or borrower) of the project.
- Project ID#: Project number that DHCD has assigned to the project.
- Project: Current project name.
- Town: City or town where the project is located.
- <u>Delegation</u>: Name of the management company delegated to provide the required information.
- <u>Date/Time:</u> Date and time of the last report status change.
- <u>Contact Agency</u>: State or quasi-public agency that will take lead responsibility for following up and reviewing the submission for a particular project.
- <u>Report Status</u>: After you have submitted your report for a particular year, you can see your information but you cannot make additional changes (i.e. the system will be "locked"). If the report is submitted with incomplete information, the report may be "Reverted" to your company to complete

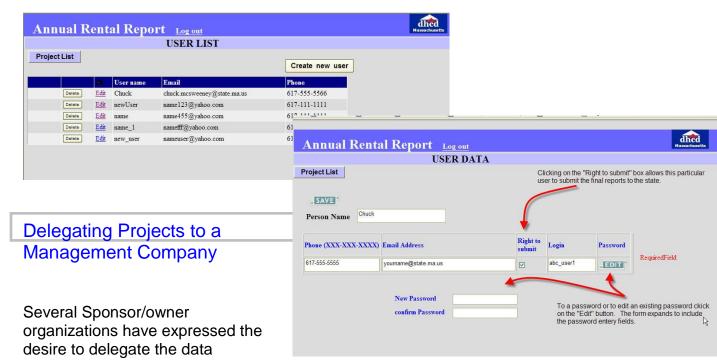
the missing data. The contact person for your company will receive an email or other communication indicating that the report has been "Reverted."

 <u>Print</u>: You can click Print to produce a report summary for a project in a selected year. Further information on printing is found below under "Step 8."

Creating Users within Your Company

The person who is assigned the administrative login ("administrative user") provided by DHCD is the only user in your company that will see and be able to use the "Update/Create User" button. When the administrative user clicks on this button the company User List opens showing all of the users that currently have access to the web-based system.

Here the administrative user may edit any of the existing users and reset their passwords. If the administrative user clicks the "Create new user" button then a blank entry form appears. Note that the phone number and the email address are optional. However, email will be a key form of ongoing contact between the designated users and the contact agency moving forward; therefore, we strongly encourage providing an accurate email for all users.



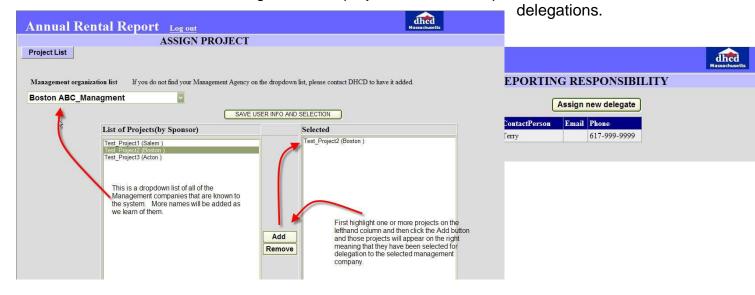
collection reporting task to the management company responsible for the project. The web-based system allows you to do this on a project by project basis. If you do not see your current management company in the list provided in the web-

based system, please contact DHCD and request that the management company be added to the list or complete and return the Delegation Form provided at the top of the System's main web address provided above.

Delegate reporting responsibility

Again remember that only the administrative user from your company will see and be able to click on this button. The first screen you will see will be a list of the delegations that you have already made. Here you may update or delete an existing delegation. To get started with your first delegation or to add an additional one, click on the "Assign new delegate" to move on to the "Assign Project Screen" shown below.

Please note that a project can only be delegated to one management company at a time and that new delegations of a project will overwrite previous



REPORTING AND SUBMITTING DATA

STEP 1: On the "Project List" screen click the underlined number in the Project ID column on any of the projects listed and you will come to the "Project Summary" screen shown below.



STEP 2: "Roll over" (copy) data from the prior reporting year into the current reporting year by clicking "yes" next to the question "do you want data to be rolled from last year?" in red at the top of the Project Summary page.

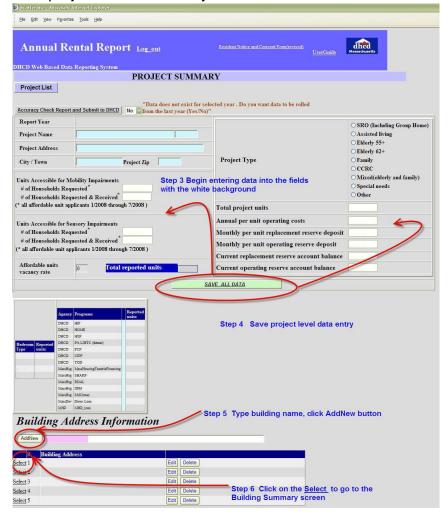


Project Level Data Entry

STEP 3: Begin entering data. Only data fields with white backgrounds are available for data entry.

STEP 4: Save project level data entry

STEP 5: on to the screen, must enter address



To move next you first building

information. If there is only one building in the project, the building address may be the same as the project address. For the purposes of this System, the building address is the street address.

It is important to remember that <u>only the affordable units are being reported</u> and that the data associated with market-rate units within developments is not required to be reported.

To add a building, type the building address of the building in the white field under "Building Address Information" and then click on the "AddNew" button. Additional buildings are to be added in the same manner. Note that from here you can edit or delete existing building address entries.

STEP 6: Once you have added building addresses, click on "Select" next to a building address to begin entering data on that address on the "Building Summary" screen shown on page 14.

Project Level Data Entry Instructions and Definitions

<u>Project Type</u>: Please select one category that most accurate describes the project:

- <u>SRO</u>: Single Room Occupancy (Including group homes)
- Assisted living: Assisted living facility for the elderly
- Elderly 55+: Housing for persons 55 and older
- Elderly 62+: Housing for persons 62 and older
- <u>CCRC</u>: Continuing Care Retirement Community
- Family: Non-age restricted housing
- Special needs: housing for persons who require specialized housing and/or supportive services (excluding housing for the elderly)

<u>Total Project Units</u>: Enter the total number of the units in the project, including the market rate units.

<u>Annual Per Unit Operating Costs</u>: Total project operating expenses divided by total number of units.

<u>Replacement reserve</u>: Reserve account established to fund ongoing capital improvements.

<u>Operating reserve</u>: Reserve account established to fund ongoing operating deficits.

Please note: If there is only one reserve account for the project, please enter the requested information into the operating reserve fields. Prior to submitting the annual data collection report, include a statement in the note section of the accuracy check report that this reserve is used to fund both capital improvements and operating deficits when necessary. The operating cost and reserve information provided should be based on the total units in a project not just the affordable units.

Total # of Households that Requested a Unit Accessible for Mobility Impairments

Provide the total number applicant households for affordable units (including households that are not current residents) that requested a unit accessible for mobility impairments during the time period of August 2014 through July 2015.

Total # of Households that Requested and Received Unit Accessible for Mobility Impairments

Provide the total number of applicant households for affordable units that requested (see above) and received a unit accessible for mobility impairments during the time period of August 2014 through July 2015. Accessible means the unit can be approached, entered, and used by persons with mobility impairments, including persons in wheelchairs.

Total # of Households that Requested a Unit Accessible for Sensory Impairments

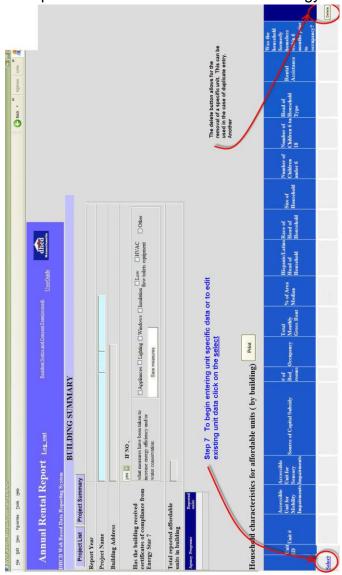
Provide the total number of applicant households for affordable units (including households that are not current residents) that requested a unit accessible for sensory impairments during the time period of August 2014 through July 2015.

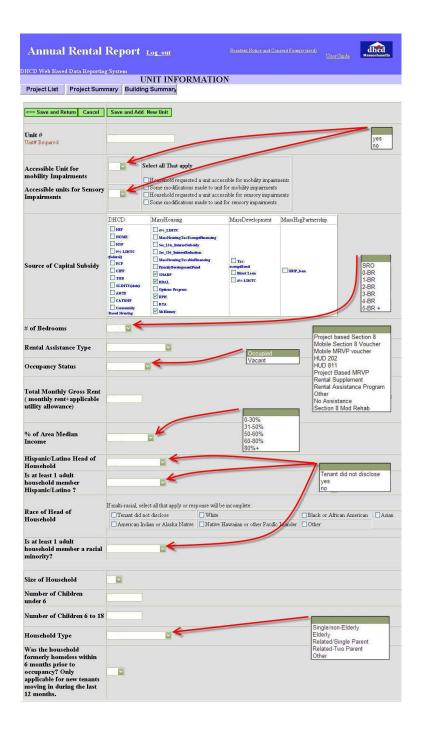
<u>Total # of Households that Requested and Received a Unit Accessible for Sensory Impairments</u>

Provide the total number of applicant households for affordable units that requested (see above) and received a unit accessible for sensory impairments during the time period of August 2014 through July 2015. Accessible means the unit can be approached, entered, and used by persons with hearing and/or vision impairments.

Definitions:

<u>Energy Star Program Certification</u> means buildings that have received certificates of compliance from the Massachusetts <u>Energy Star Homes program</u>.





Unit Level Data Entry Instructions and Definitions

Unit

Enter the unit number.

<u>Please note</u>: If physical units in a building represent shared living of more than one household, please treat each household as a separate unit for data entry purposes. As such, please assign a unique number for each household. Data should not be reported where the housing is a shelter.

Unit Accessible for Mobility Impairments

Answer "yes" or "no" as to whether the unit is handicapped accessible for mobility impairments (the unit can be approached, entered, and used by persons with mobility impairments, including persons in wheelchairs).

Household Requested a Unit Accessible for Mobility Impairments

If the household corresponding to the Unit # requested a unit accessible for mobility impairments, check (click on) the box.

Some Modifications Made to Unit for Mobility Impairments

If yes, check (click on) the corresponding box. Modifications to the unit for mobility impairments are physical changes to the unit, including widening a doorway, installing grab bars, or lowering a cabinet, to accommodate person(s) with mobility impairments.

Unit Accessible for Sensory Impairments

Answer "yes" or "no" as to whether the unit is accessible for sensory impairments (the unit can be approached, entered, and used by persons with hearing and/or vision impairments).

Household Requested a Unit Accessible for Sensory Impairments

If the household corresponding to the Unit # requested a unit accessible for sensory impairments, check (click on) the box.

Some Modifications Made to Unit for Sensory Impairments

If yes, check (click on) the corresponding box. Modifications to the unit for sensory impairments are physical changes to the unit, including installing a door bell which flashes a light for hearing impaired persons, or installing raised numbers for sight impaired persons, to accommodate person(s) with hearing and/or vision impairments,

Source of Capital Subsidy

Select all that apply. See page 15 for options.

Number of Bedrooms

Select from the following:

- SRO (single room occupancy)
- 0-BR (0 bedrooms in the unit)
- 1-BR (1 bedroom in the unit)
- 2-BR (2 bedrooms in the unit)
- 3-BR (3 bedrooms in the unit)
- 4-BR (4 bedrooms in the unit)
- 5-BR+ (5 or more bedrooms in the unit)

Occupancy Status

Select from the following:

- Occupied
- Vacant

Total Monthly Gross Rent

Enter the amount equal to the monthly rent (including tenant share) and applicable utility allowance.

% of Area Median Income

The household (annual) income as a percentage of the current HUD defined Area Median Income as adjusted by family size (see https://www.onecpd.info/reports/HOME_IncomeLmts_State_MA_2015.pdf or find through main page at https://www.hudexchange.info/manage-a-program/home-income-limits/ for calculations of percentages of HUD defined Area Median Incomes by household size.)

Select from the following:

- 0-30%
- 31-50%
- 51%-60%
- 61%-80%
- 81 %+

Example: if a household income for a family of four in Boston is \$30,000, the appropriate selection choice is "31-50%", as the household's income is greater than 30% of the Boston area median income for a family of four (\$29,550) but not greater than 50% of the HUD defined Boston area median income for a family of four (\$49,250). [Note: HUD uses "very low income" terminology to denote 50%

of the area median income, and "low income" to denote 80% of the area median income.]

Hispanic/Latino Head of Household

Select one of the following based upon whether the head of household* determines that "Hispanic or Latino"** is the best indication of his or her ethnicity.

- Tenant did not disclose
- Yes
- No

**"Hispanic or Latino" means as that term is defined by the U.S. Census Bureau (see the U.S. Census glossary at http://www.factfinder.census.gov).

Is At Least One Adult Member of the Household Hispanic/Latino?

Select "Yes" or "No".

Race of Head of Household

Check (click on) on every box that corresponds to the race or races of the head of household, as indicated by the head of household:

- Tenant did not disclose
- White
- Black or African American
- Asian
- American Indian or Alaska Native
- Native Hawaiian or Other Pacific Islander
- Other

See the U.S. Census glossary at http://www.factfinder.census.gov for definitions of races designated by the U.S. Census Bureau.

Is At Least One Adult Member of the Household a Racial Minority?

Select "Yes" or "No". Racial Minority means any race that is not White alone.

Size of Household

Enter the number of persons in the household residing in the unit.

^{* &}quot;Head of household" is the adult member of the household designated by the family or by the subsidy program.

Number of Children Under 6 Years of Age

Enter the number of children in the household under six years of age residing in the unit.

Number of Children 6 to 18 Years of Age

Enter the number of children in the household that are 6 years of age or older but under 18 years of age that reside in the unit.

Household Type

Select from the following:

- Single/non-Elderly (one-person household in which the person is not elderly)
- Elderly (one or two person household with a person at least 62 years of age)
- Related/Single Parent (a single parent household with a dependent child or children)
- Related / Two parent (a two-parent household with a dependent child or children)
- Other (any household not included in the above four definitions, including two or more unrelated individuals)

Rental Assistance Type

- Project based Section 8
- Mobile Section 8 voucher
- Section 8 Mod Rehab
- Project based MRVP (Massachusetts Rental Voucher Program)
- Mobile MRVP voucher
- HUD 202
- HUD 811
- Rental Assistance Program
- Rental Supplement Program
- Other
- No assistance

Homeless

Answer yes or no as to whether, during the last 12 months, the tenant was homeless within 6 months of occupancy of the unit. Please refer to HUD's definition of homeless to determine a household's status. See: http://www.hud.gov/homeless/definition.cfm.

STEP 7: Submit report by clicking on the "Accuracy Check Report and Submit to DHCD" button on the Project Summary Page. After reviewing the Accuracy Check Report and making any necessary corrections, click the "Submit to DHCD" button on the "Application Completeness and Accuracy Check" page.

<u>Please note</u>: Prior to submitting your report, please use the "**Notes**" field on the "Application Completeness and Accuracy Check" page for the purpose of providing a valid explanation as to why certain data was omitted from the report. For example, in instances of assisted units with project-based MRVP administered by the housing authority, some occupancy data may not be available to your company.

Once you have submitted your report for a project, "Report Submitted" will be shown on the Project Summary page (to get back to the Project Summary page from the Application Completeness and Accuracy Check page, click on the "Back to Project Summary" button.)

STEP 8: Print. You can click print to produce a report summary for a project in a selected year. The Print button is on the Project List and Building Summary pages. You should set your computer's printing preference or option to "Landscape" in order to best capture the report summary on the screen.

Example of Print Version



NOTE: This
User Guide
for DHCD's
Web-Based
Data
Reporting
System and
related
documents
may be
amended
from time to

time, available online at https://app2.ocd.state.ma.us/HsgDevAnnualReport/.