

Unit History/Status Report Spreadsheet Completion Instructions:

Complete the top portion of the form:

1. Provide current information for contacts at the Development, Owner and Management Company.
2. Complete the Building Identification Number (BIN)
3. Complete the date required for the number and type of units and the square footage.

Entries by Column (across) **Note: Management may remove all columns that do not apply to the development.**

1. **Action** – Enter the action being performed: move in (MI), move out (MO), annual recertification (AR), utility allowance change (UA), rent change (RC) or self certification (SC), Transfer From (TF) and add previous Unit #
2. **Unit Sq Ft** – Enter the number of square feet in the unit
3. **Unit #** – Enter the identifying unit number
4. **# Bedrms** – Enter the number of bedroom(s) in the unit.
5. **Name** – Enter the name of the Head of Household
6. **Head of Household Social Security Number** – Enter the Social Security Number for the Head of Household
7. **Age** – (SENIOR developments only) Enter the move in age of the either the Head of Household or Spouse
8. **Move In Date** – Enter the date the tenant occupied the unit (or was given the key to the unit.)
9. **Move Out Date** – Enter the date the tenant moved out of the unit – (leave blank if the tenant is still in the unit).
10. **Initial Cert & Recert Effective Date** – Enter the date of the initial Certification date and then enter all subsequent Recertification dates. (ref. IRS 8823 guide chapter 4) -- Transfers will retain the Household's original certification date and will show the most recent Certification date.
11. **U/A or Rent Chg Date** – Enter the date Owner/Management implemented the change to the Utility Allowance **or** Rent paid by the Tenant
12. **Tenant's Monthly Household Pmt** – Enter the monthly rent payment (only the tenant's portion of the rent).
13. **Monthly Utility Allow.** – Enter the exact Utility Allowance the tenant receives for gas, electricity, etc. (based on the approved utility allowance as documented in the tenant file).
14. **Non-Optional Charges** – Enter any charges to the tenants that are required to be paid by the tenant for the occupancy of the unit. (i.e. rental sales tax, meals, other services, parking)
15. **Gross Rent** – The Sum of Rent received from the tenant (Monthly Household Payment) plus Utility Allowance plus Non-Optional Charges (LIHTC).
 - HOME units must include the Sum of Rent received from the tenant (Monthly Household Payment) plus Utility Allowance plus Non-Optional Charges plus Rent Subsidy (Section 8 Home Choice Voucher, Rural Development, NAHASDA funds, Section 8 Project Based).
16. **Rent Subsidy Amt** – Enter the amount paid from other sources on behalf of the tenant to allow occupancy of the unit (i.e. Section 8 Home Choice Voucher, Rural Development, NAHASDA funds, Section 8 Project Based)
17. **Rental Assistance Type** – Enter the type of rental assistance provided to the tenant: project based assistance (P), tenant based assistance (T) or HOME designated unit (H).
18. **Unit Type Percent % or Mkt Rate (MR)** – Enter the tenant's qualifying income percentage or note that the unit is Market Rate (MR) with no income limits.
 - a. Tenants with incomes at or below 50% of the posted gross median income will be shown as **50%**
 - b. Tenants with incomes at or below 60% of the posted gross median income will be shown as **60%**
 - c. *Other percentages may be required by the recorded documents – verify the Developments requirements and post to the spreadsheet accordingly.*
 - d. *Common area units enter "C"*
19. **Initial # in Hshld** – Enter the number of household occupants at move-in.
20. **# in Hshld at Recert** – Enter the number of household occupants at Recertification

21. **Gross Income at Recert or Current Yr** - Enter the gross anticipated annual income amount as verified and listed on the Tenant Income Certification form at Recertification.
22. **Gross Income at Move In** – Enter the gross annual income amount as verified and listed on the Tenant Income Certification form at Move In. (Qualifying income for unit)
23. **Hshld Full Time Students (Y/N)** – Yes or No entry – Determine the student status of the Household on an annual basis. Enter Y (yes) for any household in which all occupants are full time students or N (no) for households which are not full time students. (LIHTC only)
24. **Student Code** – Enter the code established by tax credit regulations for the allowed exceptions to the full time student rule, if a unit is occupied by a household of full time students.