# ILLINOIS HOUSING DEVELOPMENT AUTHORITY

## INFORMATION TECHNOLOGY DEVELOPMENT

## AUTHORITY_ONLINE_UTILITY_ALLOWANCE_GUIDE.DOC

The following guide details how to enter Utility Allowance information for projects in Authority Online.

Created: January 2015

Illinois Housing Development Authority

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## 0.0 OVERVIEW

The following guide details how to enter Utility Allowance information for projects in Authority Online.

## 1.0 PREREQUISITES

To enter Utility Allowance information for projects in Authority Online you must have…

1. Internet Access, it is recommended that you use Internet Explorer for best results
2. A User Account setup for Authority Online
3. Permissions setup to enter Utility Allowance information

## 2.0 NAVIGATION TO THE UTILITY ALLOWANCE AREA

The following steps detail how to get to the Utility Allowance editing area after logging in to Authority Online.

## 2.1 Owner Certification (Project, Building, Unit, and Tenant Events Entry)

After you login, you'll have a list of options you can go to in Authority Online on the Programs Screen.

Programs

| | |
|---|---|
| Owner Certification | This will allow a property manager to complete their Owner Certifications for the RHTC, CDBG, HOME, and Development Fund programs. |
| Progress Report | This will allow the owner or developer to enter the Semi-Annual 8609 progress report. |
| Single Family Software Download | Single Family Participating Lenders can download the SFDMS software from here to manage their MRB, MCC, DPA, and MSP reservations. |
| My Profile | Manage your profile including your password, contact information, your organization information, and other information about your organization. |

Many features of the Authority Online system are based your organization. In some cases, you may need to share your 'Organization Code' with another organization or with someone in your organization who is registering as a new user. This organization code can be found from your profile screen on the 'My Organization' page.

Click on the **Owner Certification** link…

| | |
|---|---|
| Owner Certification | This will allow a property manager to complete their Owner Certifications for the RHTC, CDBG, HOME, and Development Fund programs. |

## 2.2 Property Search

You'll then see a list of projects that are accessible to you, notice that on top of that list is the filter bar, use it to narrow down the list…

Properties Listing

IHDA
401 N. Michigan
Chgo IL 60611

Show All Owner Certificates

Properties Assigned to you:

| Property Name | Eff Date | Status | Award Number | Num Buildings | Num Units |
|---|---|---|---|---|---|

For example…

Properties Assigned to you:

| test | Eff Date | Active | Award Number | Num Buildings | Num Units |
|---|---|---|---|---|---|

You may also want to display previous years on your list to do so check the box by "Show All Owner Certificates" towards the top of the screen…

☐ Show All Owner Certificates to ☑ Show All Owner Certificates

After you narrowed down the list of properties click on the blue link for the property and Eff Date (Compliance Year) you want to work in..

| | | |
|---|---|---|
| Test Development | 2014 | Active |

Afterwards you'll be directed to the Prpoerty Details Screen, exampled as follow.

Property Details

There are 2 errors for this property. Click to display.

Paula's Place | IHDA

222 Love-

Love IL, | Scattered Site: No

Utility Allowances | Import Events | Export Events | Remove Property

| Program | Award Number | Award Date | Buildings | Units |
|---|---|---|---|---|
| 9% Low-Income Housing Tax Credits | 2638 | 12/12/2012 | 1 | 3 |

Restriction Type: Rent and Income | Floating Units: False

Rental Assistance: N/A | Extended Use Dates:

Owner Certification Year: 2013

Owner Entity Information

Name: 46th & Vincennes Limited | Tax ID Number: 36-3664809

Address: P.O. Box 53332

City: Chicago

State: IL

Zip: 60653

Primary Owner Contact

Name

Email

Phone

Fax

Management Company

Name

Address

City

State

Zip

On-Site Property Manager:

Primary Management Contact

Name

Email

Phone

Fax

On-Site Phone:

## 2.3 Utility Allowances button

Click on the Utility Allowance button on the right side of the Property Details Screen…


**Best Practice**: It is advised that all Utility Allowances be created before moving on to Tenant Events as it is often a requirement for creating/updating Tenant Events.

## 3.0 UTILITY ALLOWANCE OPTIONS

After you click on the Utility Allowance button you'll see the Utility Allowances Screen and on it you'll see a list of Utility Allowances, which may be blank if there aren't any, and a button to add a new utility allowance.

Utility Allowances

| | Description | Allowance Type | Unit Type | Effective Date | Cert Year | |
|---|---|---|---|---|---|---|
| Show BINs | Utilities | Utility Company Estimate | 1 Bedroom | 3/7/2013 | 2013 | Copy |
| Show BINs | More Utilities | Utility Company Estimate | 3 Bedroom | 1/1/2013 | 2013 | Copy |
| Show BINs | 1brua | Utility Company Estimate | 1 Bedroom | 1/1/2012 | 2012 | Copy |
| Show BINs | 2brua | Utility Company Estimate | 2 Bedroom | 1/1/2012 | 2012 | Copy |
| Show BINs | 3brua | Utility Company Estimate | 3 Bedroom | 1/1/2012 | 2012 | Copy |

Add New

### 3.1 Editing a Utility Allowance

To edit an existing utility just click on one of the blue highlighted utility options in the Description column, for example…

| | | | | |
|---|---|---|---|---|
| Show BINs | st14 | Utility Company Estimate | Studio | 1/1/2014 |

This will lead you to the Utility Allowance Entry Screen and will be populated by the information that was already entered previously.

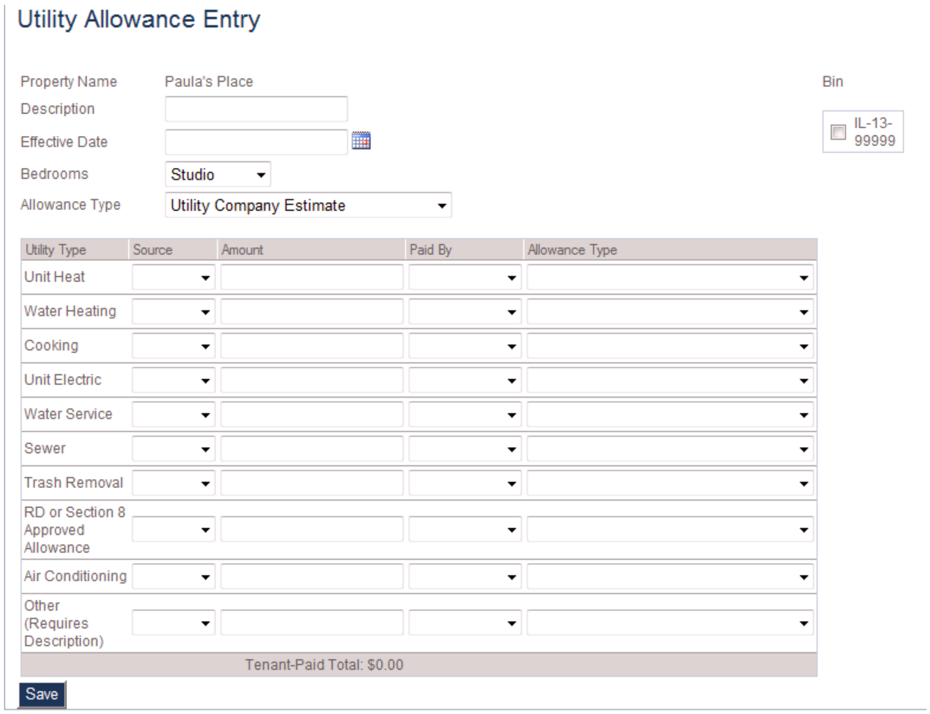
### 3.2 New Utility Allowance

To create a new utility Allowance click on the Add New button, this will lead you to a blank Utility Allowance Entry Screen…

Add New

## 4.0 UTILITY ALLOWANCE ENTRY SCREEN

The Utility Allowance Entry Screen will appear as follows…




If you're editing a previously entered Utility Allowance than many of these fields will already be populated. The following sections detail how the Utility Allowance Entry Screen's information is divided.

### 4.1 Utility Description Information

The top of the Utility Allowance Entry Screen shows the descriptive information for the Utility Allowance, which includes the Property's name (this will be automatically populated), a descriptive name you must choose, the effective date, the number of bedrooms this utility allowance applies to, and the type of utility allowance it is, for example…


to


All of this information is required

**Best Practice**: For Description enter in a name that would indicate what effective date and bedroom size it's for, for example 1bdrm2012. Please include additional descriptive features if you have multiple Utility Allowances for a bedroom type to help you choose the correct Utility Allowances in the future.

## 4.2 Applying to Buildings

Another important portion of the Utility Allowance Entry Screen is the building selection area in the upper right of the screen.  Be sure to select the appropriate building(s) that you want this utility allowance to be an option for.

| Bin | |
|---|---|
| ☐ IL-13-99999 | ☑ IL-99-99999 |

**Note**: If you don't select at least one building the Utility Allowance will not be created.

## 4.3 Utility Information

The actual Utility Allowance information goes into the lower section, where you have multiple types of utilities and corresponding options…

| Utility Type | Source | Amount | Paid By | Allowance Type |
|---|---|---|---|---|
| Unit Heat | | | | |
| Water Heating | | | | |
| Cooking | | | | |
| Unit Electric | | | | |
| Water Service | | | | |
| Sewer | | | | |
| Trash Removal | | | | |
| RD or Section 8 Approved Allowance | | | | |
| Air Conditioning | | | | |
| Other (Requires Description) | | | | |
| | | Tenant-Paid Total: $0.00 | | |

For each line you have to designate the Source, the Amount, whether it is tenant or owner paid, and the allowance type.

**Note**: If the utility allowance are all utility types bundled together you can use one single line in the "Other" row with the "Source" column set to "All", then the amount, whether it is tenant paid or owner paid and the allowance type, exampled as follows…

| | | | | |
|---|---|---|---|---|
| Other (Requires Description) | All | 90.00 | Tenant Paid | Utility Company Estimate |

## 4.4 Saving

After you're done placing in the information for the Utility Allowance, click on the Save button to maintain the Utility Allowance…

**Save**

The utility allowance is now an option for the project…

| | Description | Allowance Type | Unit Type | Effective Date | Cert Year | |
|---|---|---|---|---|---|---|
| Show BINs | 1br2013 | Utility Company Estimate | 1 Bedroom | 1/1/2013 | 2013 | Copy |