Welcome, and thank you for attending the HAP R3 Welcome Webinar!

The webinar will begin shortly.

The format of this webinar includes speakers, a PowerPoint presentation, and a Q&A session.

This session is being recorded, and a link will be provided to all participants. Participants will also receive a copy of the slideshow.

Be sure to check your audio settings to ensure that you will be able to hear the presenters.

Please type questions in the Chat panel and address them To: All Panelists.
Introduction to the Community Affairs Team

Carmen Williams, Senior Program Officer  
cwilliams@ihda.org

Michael Wieczorek, Program Officer  
mwieczorek@ihda.org

Marlene Corral, Supervisor  
mcorral@ihda.org

Monica Enriquez, Assistant Director  
menriquez@ihda.org

Nicki Pecori Fioretti, Director  
npecorifioretti@ihda.org

Main Contact

TFHAP3INFO@IHDA.ORG
Agenda

- Program Summary and Terms of Assistance
- IHDA Resources
- MITAS Review
- Intake and Eligibility Process
- Construction Phase
- Disbursement Document Overview
- Reporting, Work Safe Practices, and Q&A
Program Summary and Terms of Assistance
Program Summary

- The Home Accessibility Program (HAP), funded by the Affordable Housing Trust Fund, provides funding to help income-qualified persons (elderly with a physical limitation or persons with disabilities) to remain in their homes by improving accessibility and safety.

- Eligible households will receive up to $25,000 in assistance as a five-year forgivable loan.

**Hard costs**
- Replacement, repairs, health and safety items

**Soft costs**
- Title, recording fees, termite inspections

**Project delivery**
- Administrative costs associated with each project
- Limited to 15% of the hard and soft costs for work write-ups, cost estimates, inspections, and permits (when excluded from contractor’s overhead costs)
Eligible Units

- Funds must be used towards rehabilitation of owner-occupied or renter-occupied single family homes.
- Households must be at or below 80% AMI
- Properties must be real property in the state of Illinois
- Ownership must be held in fee simple title
- Property must be clear of all contractor and tax liens
- Property must be held in fee simple title
- If owner-occupied, property must be sole residence of all homeowners
Ineligible Units

- No contracts for deed
- No trusts or transfer on death instruments
- No reverse mortgages
- No properties with a home equity line of credit
- No properties primarily used for business (more than 50% of floorspace is used for business)
IHDA Resources
Visit the IHDA Website

IHDA Resources

http://www.ihda.org/my-community/revitalization-programs/

- Appendices A-H (Containing all program forms), IHDA Architectural Standards, Acceptable Forms of Verification
- IHDA Property Standards, Program Manual, Income Calculator
- Webinars, Term Sheet, FAQ
Visit the IHDA Website

IHDA Resources

Revitalization And Repair Programs

FAQs

Abandoned Property Program (APP) FAQs
Land Bank Capacity Program (LBCP) and Technical Assistance Network (TA Network) FAQs
Blight Reduction Program (BRP) FAQs
Home Accessibility Program (HAP) FAQs

Download FAQs

Note: This is a partial list of program requirements and is meant to be a general guide. This FAQ may be updated from time to time. Please check back.
MITAS Review
MITAS System Administrator Assignment

Designate your MITAS Administrator (up to 3)

- Fill out MITAS System Administrator form and email to TFHAP3info@ihda.org to request a username and password

- The MITAS System Administrator form will be found in Appendix H
Username and Password Assignment

- Community Affairs will email Username and Password for your MITAS System Administrator(s)
- Add email address to reset your own password

IMPORTANT:
ALWAYS USE INTERNET EXPLORER AS YOUR BROWSER FOR MITAS
MITAS Funds Reservation

- Refer to the MITAS Reservation Manual and Document Uploading Guide
  - Login to MITAS to Reserve funds: (https://ilrss.ihda.org/ilrss)
  - Enter information into required fields

- You will receive a Commitment Confirmation

  Note: The Commitment Confirmation is NOT a ‘Pre-approval’
Intake and Eligibility Process
Rehabilitation Flow Chart

Initial Intake:
1. Marketing, referrals, and applicant intake
2. Application processing (Income Calculator Verification)
3. Preliminary application review (SHPO, floodplain, and mine review)

Property evaluation and assessment (SFR or SPR-R) including lead (Work write-up), if applicable

Bidding (2-3 bids) and contractor selection

Reserve funds in MITAS for eligible applicant

Send executed mortgage, promissory note, and "Special Notice About Your Forivable Loan" to IHDA. Only the executed mortgage is sent for recording.

Confirm pre-approval package and checklist are complete and send file to IHDA for pre-approval

Loan Closing and Pre-Construction Conference

Send executed mortgage, promissory note, and "Special Notice About Your Forgivable Loan" to IHDA. Only the executed mortgage is sent for recording.

Construction Management and Final Inspections are conducted

Project Completion Certificate is updated with final loan amount (total hard costs)

Payout Request is submitted (including hard costs, soft costs, and project delivery)
Pre-approval Checklist
Sample File Checklist

Appendices

Please visit our website www.ihda.org to access webinars, FAQ, and forms. Click on the tabs “Community”, then “Revitalization and Repair Programs” to access the forms listed below:

Appendix B--Checklists
- Sample File Checklist
- Pre-approval Request Checklist
- Partial Payout Request Checklist
- Final Payout Request Checklist

Indicates which documents are to be sent to IHDA and which are to be kept in the applicant’s file:
- Homeowner Eligibility Documents
- Loan Settlement
- Construction
- Close-Out Documentation
Program Start Cheat Sheet

Appendices

Please visit our website www.ihda.org to access webinars, FAQ, and forms. Click on the tabs “Community”, then “Revitalization and Repair Programs” to access the forms listed below:

Appendix B — Checklists
- Sample File Checklist
- Pre-approval Request Checklist
- Partial Payout Request Checklist
- Final Payout Request Checklist
- Program Start Cheat Sheet
### MITAS Commitment Confirmation

**Commitment Confirmation**

**Lender:** IHDA SINGLE FAMILY LOANS  
**Branch:** 9000 - Trust Fund  
**User:** ETURNER  
**Loan Number:** 1F901265  
**Lender Loan Number:**  
**Reservation Date:**  
**Reservation Expiration Date:**  
**Mortgagor Last Name:**  
**Mortgagor First Name:**  
**Social Security Number:** XXX-XX-0001  
**Loan Amount:** $25,000.00  
**Loan Type Code:** TRUST FUND  
**Interest Rate:** 0.0000  
**Purchase Price:** $0  
**Points:** 0.0000  
**Assistance Amount:** $0  
**Program Type:** HAP (Rd-2) 80% AM  
**Sub Program:** Home Accessibility Program  
**Allocation:** Home Accessibility Program (Rd-2) 80%  
**Final Purchase Date:** 07/31/2021  
**Loan Status:** Reservation

**Pod Insurer:**  
**New or Existing:** EXISTING  
**Targeted Area Status:** Non-Targeted  
**Property Address:**  
**Contact Information:**

**Disclaimer:**  
This is a reservation of funds only and not a guarantee to purchase your loan. You must submit all required documentation per the Lender Guide and the Program Agreement for review and approval. This registration is being held on your behalf under the premise that all data has been input in a correct manner. Theo input of incorrect information may result in this reservation being void. Please review this Registration Confirmation carefully and make appropriate changes or contact our offices for assistance.
Scope of Work Narrative

- The Scope of Work Narrative will be a summary of all work to be performed.
- Narrative must be on grantee letterhead.
Community Affairs Income Calculator

- You will need to complete the Income Calculator for each household to determine whether they meet income guidelines for the program (Below 80% AMI).
- There are four pages to the Income Calculator that must be submitted for each applicant.
  - Income Limit
  - Household Member
  - Adjustments and Deductions (this page may be blank if there are no deductions)
  - Eligibility Assessment
- The Community Affairs Calculator, Income Limits, and User Guide will be found under “Appendix C” on IHDA’s HAP page at: 
  http://www.ihda.org/my-community/revitalization-programs/
### Community Affairs Income Calculator

**Income Limit Page**

Include:
- County
- AMI Group (30%/50%/80%)
- Number of household members
- Name
- Borrower and Co-borrower
- Age
- Disability status

---

**INSTRUCTIONS**

Navigate through this form's tabs, completing all yellow answer boxes as applicable. Complete one tab (IF Member #1) per income- or assistance-earning household member 18 years and older. Report all types of income and assistance earned. If you need to report income or assistance for more than 8 household members, contact RHDA's Community Affairs Department. After reporting income, complete the Adjusted Income tab, and review the household's income eligibility on the Eligibility + Signatures tab. After obtaining all necessary signatures, return this completed form and all accompanying documents to the corresponding Trust Fund Program at the Illinois Housing Development Authority.

If you have questions, please contact your Program Officer.

---

**INCOME LIMIT INFORMATION**

<table>
<thead>
<tr>
<th>County</th>
<th>AMI Requirements by Program</th>
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<tbody>
<tr>
<td>AMI limit:</td>
<td>Habitat for Humanity Below 80% AMI</td>
</tr>
<tr>
<td>number or household member</td>
<td>Home Accessibility Program Below 80% AMI</td>
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<tr>
<td>0</td>
<td>Single Family Rehab Below 80% AMI</td>
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**HOUSEHOLD INFORMATION**

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<thead>
<tr>
<th>Total number of household members:</th>
<th>Child Under 18</th>
<th>Child Under 18 or Over</th>
<th>62 Years of Age or Older</th>
<th>Disabled</th>
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</thead>
<tbody>
<tr>
<td>Borrower</td>
<td>Co-borrower</td>
<td>Name:</td>
<td>(Select)</td>
<td>(Select)</td>
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### Community Affairs Income Calculator

**Household Member Page(s)**

Include:
- Employment
  - Including annual/hourly wage
  - Hours worked per week
- Assets
  - Property and value
  - Investments
- Other Income
  - SSI/Veterans benefits/Pension/etc.

#### EMPLOYMENT WAGES

<table>
<thead>
<tr>
<th>Job Position</th>
<th>Annual Wage</th>
<th>Hours Worked</th>
<th>Total Hourly Wage</th>
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</thead>
<tbody>
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</table>

**Assets**

<table>
<thead>
<tr>
<th>Asset Type</th>
<th>Asset Description</th>
<th>Current Cash</th>
<th>Asset Income from</th>
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**Other Income**

<table>
<thead>
<tr>
<th>Benefits Among Pension</th>
<th>Public Assistance</th>
<th>Other Income</th>
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<tbody>
<tr>
<td>Benefits Among Pension</td>
<td>Public Assistance</td>
<td>Other Income</td>
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<tr>
<td>Benefits Among Pension</td>
<td>Public Assistance</td>
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<tr>
<td>Benefits Among Pension</td>
<td>Public Assistance</td>
<td>Other Income</td>
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<tr>
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<td>Public Assistance</td>
<td>Other Income</td>
</tr>
<tr>
<td>Benefits Among Pension</td>
<td>Public Assistance</td>
<td>Other Income</td>
</tr>
</tbody>
</table>
Community Affairs Income Calculator

Adjustments and Deductions Page:

Eligibility Assessment Page:

Adjustment Income-Dependent Eligibility Assessment

FAMILY ELIGIBILITY

Income Limits
Program Income Limit (REI)

Household Income
Household Gross Income

Adjusted Household Income

Income to Enter in Mitue Loan Reservation
Enter the following monthly household adjusted income per under the Mortgage section (HOUSING HELP)

SIGNATURES (mandatory for eligible households)

I certify that the information contained in this certification is true and complete to the best of my knowledge.

Signature of Applicant:

Printed Name:

I certify that the information contained in this certification is true and complete to the best of my knowledge.

Signature of Co-Applicant:

I certify that the information contained in this certification is true and complete to the best of my knowledge.

Signature of Co-Applicant:

“Attach sewer decessent code for the review maintain a copy in the borrower’s file”
Bid Tabulation

- A minimum of two bids (preferably three) must be obtained on behalf of the homeowners for all projects.

- Obtaining more than one bid helps your program in the following ways:
  - Assists you in assessing the validity of your cost estimate
  - Establishes that costs are reasonable for your market
  - Allows choice of contractors for the administrator and owner

- If there is only one bid, please add a comment on the checklist as to why that was the case.
State Historic Preservation Office Clearance

- The State Historic Preservation Office must review all homes to be rehabilitated, unless your organization is a certified local government (CLG).
- Each pre-approval package will need a letter from the State Historic Preservation Office (if applicable), indicating that
  - Home is not a historic property
  - Scope of work complies with the State Historic Preservation Office requirements
    - If your project is located in an historic area, additional documentation will most likely be required. (Scope of work updates are typically required.)
    - **Note:** You may **NOT** begin rehabilitation until you have received an approval/no comment letter back from the State Historic Preservation Office.
- When submitting a property for approval, keep in mind that there is typically at least a 30-day review turn-around.
State Historic Preservation Office Clearance

- Example letter indicating scope of work adjustments that must be made to meet State Historic Preservation Office requirements:
Proximity to an Underground Mine

- IHDA requires that a map showing the proximity to underground mines be provided for each project to be funded.
- All properties within the proximity zone will be required to have mine subsidence insurance.
- Example map of a project where the homeowner would need to carry mine subsidence insurance:
Property Insurance

- All property insurance documents must list “Illinois Housing Development Authority” as “Additional Insured”
- Additional Interest, Additional Mortgagee, etc. is unacceptable
- Must be listed under the full name and address:

  Illinois Housing Development Authority
  111 E. Wacker Dr., Suite 1000
  Chicago, IL 60601
“Before Photos”

- Include photographs in the pre-approval package indicating where rehab will take place.
- Photos must reflect line items in the Cost Estimate and Scope of Work.
- Label pictures for ease of reference.
Title Search

- *Submit a title search to indicate the borrowers listed in the pre-approval checklist and income calculator are the only owners of the property

- *All owners must live in the home

- Property must be clear of all contractor and tax liens

- If property taxes have been sold to a tax buyer, the property is ineligible

- Properties with open foreclosure cases are ineligible
Uploading a Pre-Approval Package

- Save the Pre-Approval Package as one file and upload into MITAS.
  - Pre-Approval Checklist
  - Documents listed on Pre-Approval Checklist

- Notify TFHAP3info@ihda.org when your Pre-Approval Package has been uploaded for review.

- Community Affairs will review your Pre-Approval Package and email a ‘Pre-Approval’; or notify you of any discrepancies.

- If IHDA requests any additional information for the Pre-Approval Package, please email the requested documents. Do not upload them to MITAS.

- Once you receive a pre-approval, you may proceed with the pre-construction meeting for your project.
Mortgage and Promissory Note Execution

- The Mortgage and Promissory Note must be executed after the homeowner has been pre-approved and prior to any construction being done.

- Review the Mortgage and Promissory Note in their entirety with the homeowner, to ensure the homeowner fully understands their obligation under the agreements.

- The amount listed on the mortgage will not reflect the actual loan amount. Review the “up to maximum $25,000” language.

- Refer the homeowner to the “Special Notice About Your Forgivable Loan”.

- The Project Completion Certificate, available at the end of construction, will indicate the full dollar amount of the loan (hard costs of project).
Mortgage and Promissory Note

- Exhibits included with Funding Agreement
- Note and Mortgage are fillable

**PROMISSORY NOTE**

U.S. $25,000.00

FOR VALUE RECEIVED, the undersigned ("Borrower") promise(s) to pay to the order of the Illinois Housing Development Authority, a body politic and corporate of the State of Illinois ("Noteholder"), THE LESSER AMOUNT of the following: (a) Twenty-Five Thousand __________________ and No/100 Dollars ($25,000.00 __________), or (b) __________.

STF __________________

This MORTGAGE was prepared by and after recording return to:

Community Affairs Department
Illinois Housing Development Authority
111 East Wacker Drive, Suite 1000
Chicago, Illinois 60601

Property Identification No.: ______________________

Property Address: ______________________

STF: __________________

This MORTGAGE is made this ______ day of __________, 20 ________, by ________ ("Borrower") to the Illinois Housing Development Authority, a body politic and corporate of the State of Illinois ("Lender").
Original Documents

- IHDA Executed Promissory Note
  - Sponsor will mail directly to IHDA after project completion

- Original Recorded Mortgage
  - Sponsor will submit to county recorder’s office
  - County recorder’s office will mail to IHDA:

  Illinois Housing Development Authority
  Community Affairs Department
  Suite 1000
  111 E. Wacker Dr.
  Chicago, IL 60601
Special Notice About Your Forgivable Loan

Illinois Affordable Housing Trust Fund
Home Accessibility Program (HAP) Round 3

Congratulations and welcome to the Home Accessibility Program: HAP provides funding to units of local government and non-profit organizations (known as grantees) throughout the state to help homeowners make necessary home repairs. This is notice to IHDAs that you are eligible to receive funds up to $25,000 for home repairs under HAP. This 'top-off' amount includes: costs for repairs to your home and any additional soft costs associated with the home repairs (e.g. blinking, permits, lead inspections, and termite inspections). However, your top-off amount will consist of construction costs only and will not include any soft costs. The mortgage and promissory note will reflect the maximum assistance available, although you are only responsible for the rehabilitation (scope of work) costs amount.

*Please keep in mind that the actual loan amount may differ, depending on the agreement upon scope of work costs amount.

The promissory note and mortgage must be executed by the homeowner prior to any construction being done.

Borrower Acknowledgement and Acceptance:

I (borrower) understand that the actual amount of my loan may be less than the maximum amount possible ($25,000), depending on the agreed-upon scope of work. The actual loan amount will be included in the Project Completion Certificate, which will be available once rehabilitation is complete.

Owner-Occupied □ Rental-Occupied □ Tenant Name:

Borrower Printed Name: __________________________
Borrower Signature: __________________________

Co-Borrower Printed Name: __________________________
Co-Borrower Signature: __________________________

Property Address: __________________________

If a third party lender, site company, or others needs the loan amount confirmed after rehabilitation is complete, please reach out to an IHDAs representative at 877-456-1620 or at IHDA.reps@ihda.org.
Construction Phase
Construction

- Refer to the Home Accessibility Program (HAP) Round 3 Manual for rehabilitation requirements for the construction component of HAP

- IHDA Construction Disbursement Templates and IHDA Property Standards are available in the HAP section of the IHDA website: [http://www.ihda.org/my-community/revitalization-programs/](http://www.ihda.org/my-community/revitalization-programs/)

- Prevailing Wage does not apply for this Trust Fund program
Top Reminders from IHDA’s Construction Team

- Establish a rehabilitation priority that addresses code violations, energy conservation, major systems, incipient issues

- Avoid ambiguities with complete plans and specs, be prepared for conflict resolution

- Work with the homeowner to address needs and expectations when drafting specs

- Make sure work of GC mirrors construction documents

- Confirm IHDA property standards
Lead Testing and Clearance

- Grantees must follow Illinois Lead Prevention Code guidelines when addressing Lead Based Paint:
  
  [http://dph.illinois.gov/sites/default/files/77%20IAC%20845.pdf](http://dph.illinois.gov/sites/default/files/77%20IAC%20845.pdf)

- Lead Risk assessment is required for pre-1978 built homes, it must be done within a year of the start of construction

- Refer to the HAP Program Manual regarding risk assessment and clearance testing
Disbursement Document
Overview
Partial Payout Checklist:

Final Payout Checklist:
Contractor Sworn Statement

- Include an invoice if unable to list items on form.
- There should not be an amount indicated in the Balance to Complete field if you are submitting a final payout request.
Contractor Lien Waiver

- Lien Waiver for each contractor listed on Sworn Statement (general contractor and all sub contractors)

- Contractor’s name must be included in Contractor’s Affidavit Section

- Partial Lien Waivers must be submitted for Partial Payout Requests
Project Delivery Worksheet

- Project delivery is the administrative costs associated with each project.
  - Eligible costs include staff time associated with client intake, work write-ups, cost estimates, environmental reviews, inspections, and permits (when excluded from contractor’s overhead costs)
  - Limited to 15% of the hard and soft costs

- Your project delivery worksheet needs to reflect the actual hourly wage for staff and the actual hours worked on the project.

- Do not back into the 15% maximum allowable limit, list the actual time you’ve worked on a project. (In most cases, the amount of time you’ve spent working on a project will not be exactly 15% of hard and soft costs; you should report the actual time spent.)
# Project Delivery Worksheet

## Project-Related Soft Costs

Please complete the following information, sign, and place in each individual activity file. This form must also be included with each Trust Fund payout request submitted to IHDA.

### Program Name: Home Accessibility Program Round 3

<table>
<thead>
<tr>
<th>Program Name:</th>
<th>Home Accessibility Program Round 3</th>
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<tbody>
<tr>
<td>STF#:</td>
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<tr>
<td>MITAS #:</td>
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<tr>
<td>Property Address:</td>
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<td>City:</td>
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<table>
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<tr>
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<th>Last</th>
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<tr>
<td>Tenant Name:</td>
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<th>Title</th>
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<td>Income Verifications</td>
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<td>Intake</td>
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<td>Inspections</td>
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<td>Work Write-Ups</td>
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**TOTAL**  $ 0.00

I certify that the above information is correct and that all items can be verified by either timesheets for this specific project or a budget approved for this program based on actual time and costs incurred for these activities analyzed over a six-month period.

Signature of Authorized Signatory: ____________________________ Date: ____________________________
Project Completion Certificate

- Grantees will submit this signed document to IHDA staff once the project is complete.

- This document is referenced in the “Special Notice About your Forgivable Loan”.

- The Final Loan Amount will reflect the Contract Amount, which is the equivalent of all hard costs associated with the project.
Select one of the following three check boxes, depending on the date the home was built and whether or not the home will need to pass a clearance test:

- 1) I hereby certify that this home was built before 1978 and a lead risk assessment was done on [date]. There is no presence of lead in the area of work and no further testing is required.

- 2) I hereby certify that this home was built before 1978 and a lead risk assessment was done on [date]. Work safe practices were followed as dictated by state and local ordinances. Home passed lead clearance test on [date] after construction was completed.

- 3) I hereby certify that this home was built after 1978, therefore, no preconstruction testing was required.

See the chart below for requirements regarding how to address lead based paint:
“After” Photos

- All significant work done on the home must be captured in the photos you submit with your Disbursement Package.
- Any construction items mentioned in the Scope of Work must have accompanying photographs.
- Submit color photos.
- Label all pictures.
- Scope of Work should be revised to reflect final work completed.
Uploading a Payout Package

- MITAS will allow you to upload only one Pre-approval Package and one Payout Package per project.

- If you have previously uploaded a Partial Payout Package and need to upload a Final Payout Package, email your Final Payout Package to TFHAP3info@IHDA.org. We will upload the Final Payout Package for you.

- Community Affairs will review your payout package and email you when your disbursement has been processed for payout; or notify you of any discrepancies.

- If IHDA requests any edits be made to the payout package, please email the requested documents as a reply to the email requesting the additional items. Do not upload requested items into MITAS.
Reporting, Work Safe Practices, and Q&A
Reporting

- Quarterly Reports—Due by the 15th after quarter end
- Quarterly Status Report Timeline in Appendix G
- Annual Audited Financial Statements—Due within 9 months after the fiscal year end
- Retain all files and supporting documentation for five (5) years
- A link will be provided to submit reports
Work Safe Practices – Covid 19

Refer to state issued guidance at:

- [https://coronavirus.illinois.gov/s/prevention-at-work](https://coronavirus.illinois.gov/s/prevention-at-work)

IHDA Recommendations:

- Obtain written consent of the homeowner prior to commencing any work.

- Stagger shifts, use of face coverings and/or PPE, proper social distancing and sanitization practices
Questions