

Procorem Document Naming Matrix: Tax Credit (with HOME/HTF if applicable)

To use this matrix, the boxes should be viewed as folders and subfolders within the compliance work center. The bullet point lists are the documents you would find within those subfolders. Use those bullet points as a reference guide to name documents you are uploading.

Documents are to be named using the format below. No parentheses, no dashes, no commas, etc.

Property Name Procorem Number MMDDYYYY (Use date of upload) Document Name as listed on the attached Matrix Effective Date (if needed)

EXAMPLE: Happy Living Villas 60999 08302022 Annual Report Property's Response to 60 day Notice

*All documents should be uploaded as a PDF, except for the Excel documents listed below:

Financials (submitted with the annual report)

Budget (submitted with the annual report)

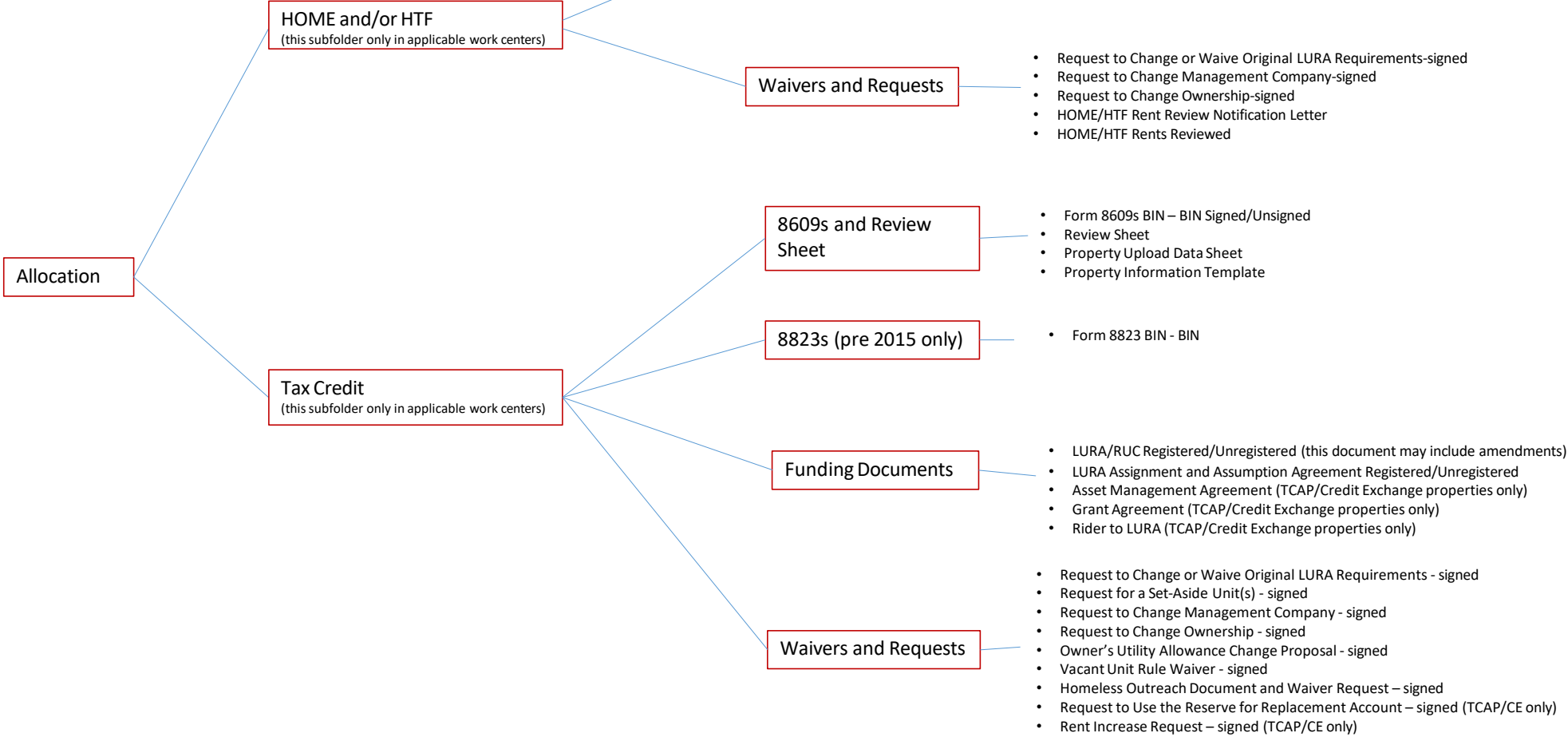
Property Upload Data Sheet (new properties only)

Property Information Template (new properties only)

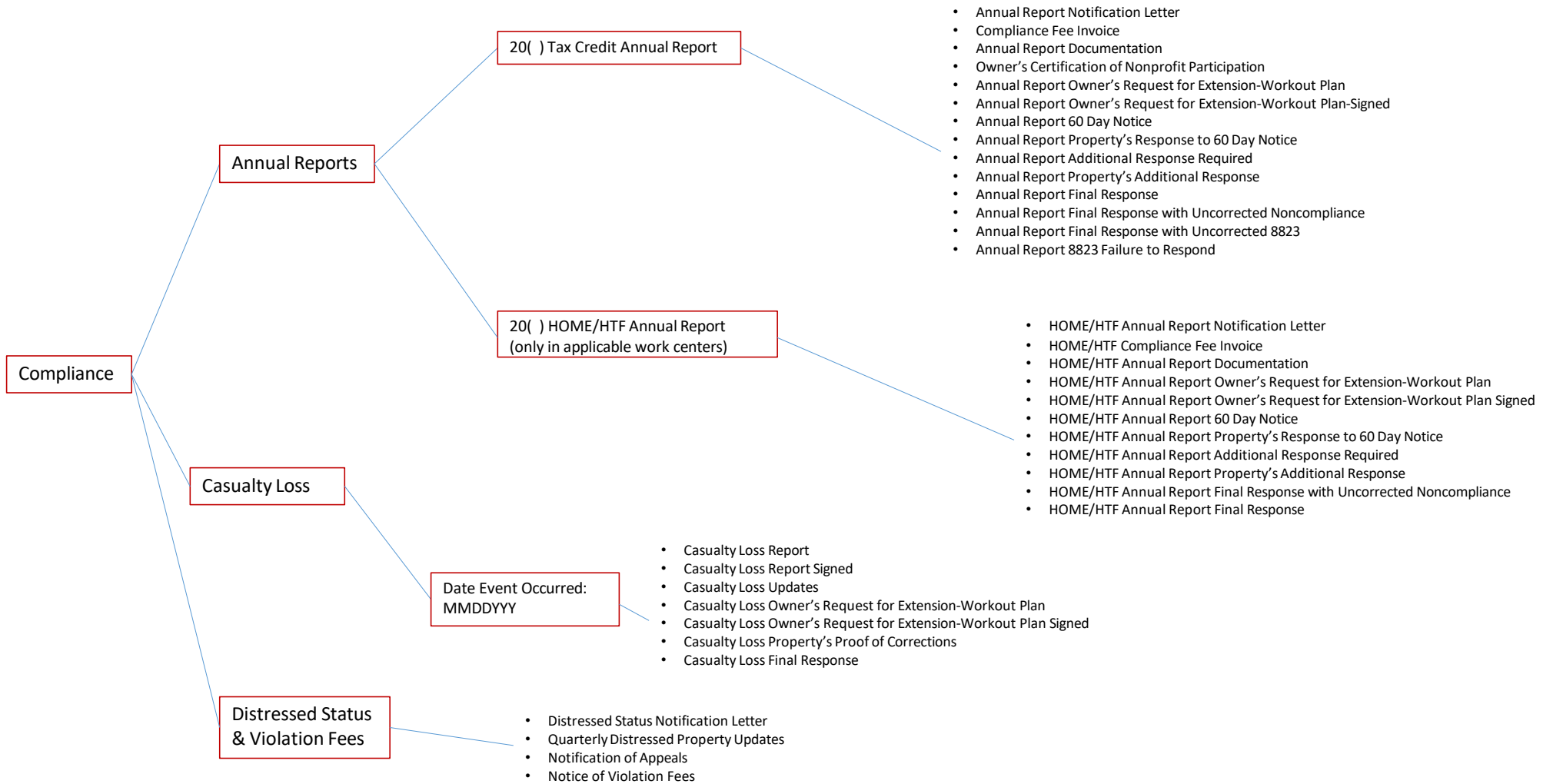
HOME and HTF Rent Review Spreadsheets

All Files should be named: Procorem Property Name Procorem Number MMDDYYYY Document Name *Please add a space between each

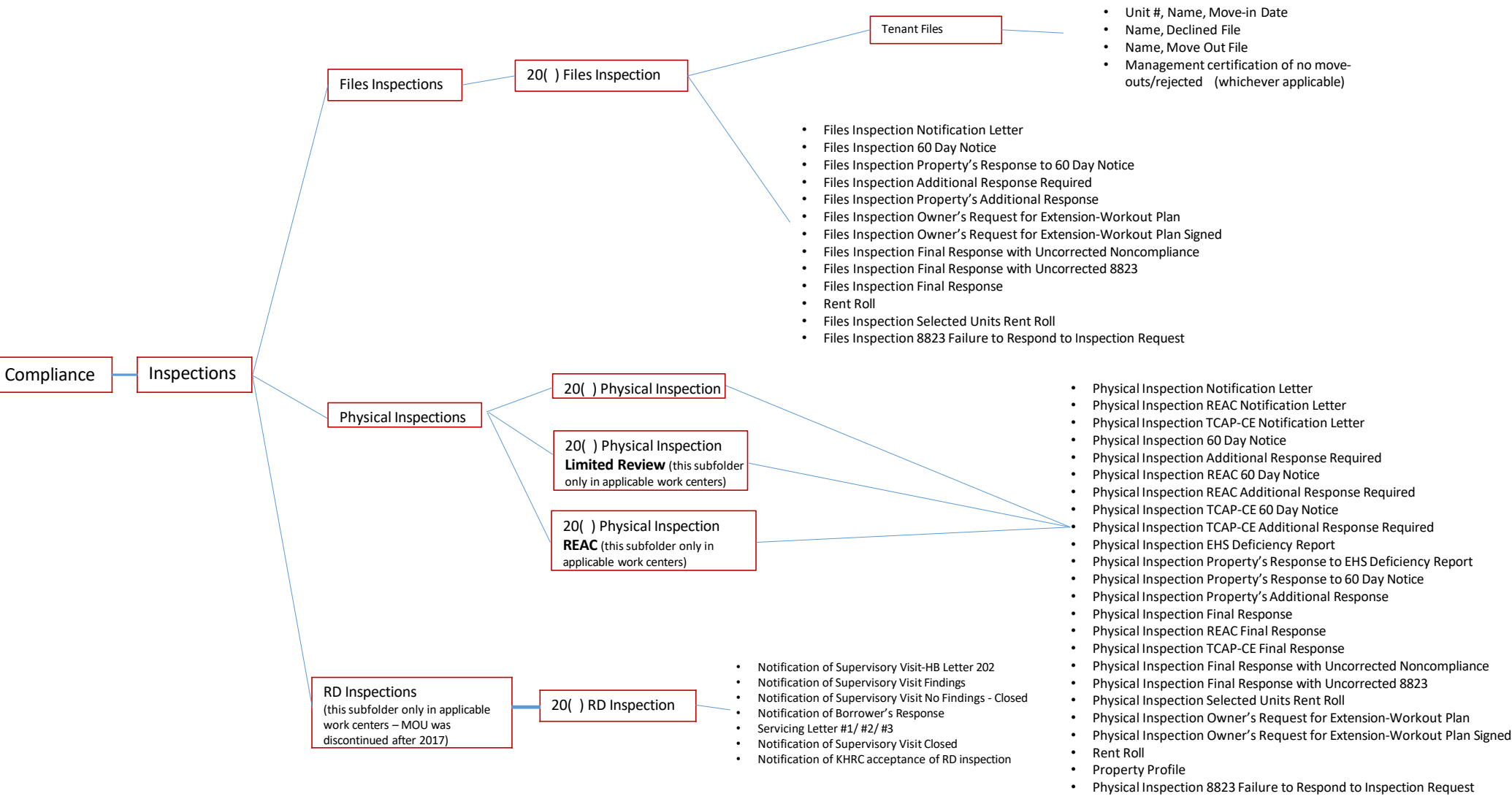
Updated August 2022 –
Procorem Document Naming Matrix



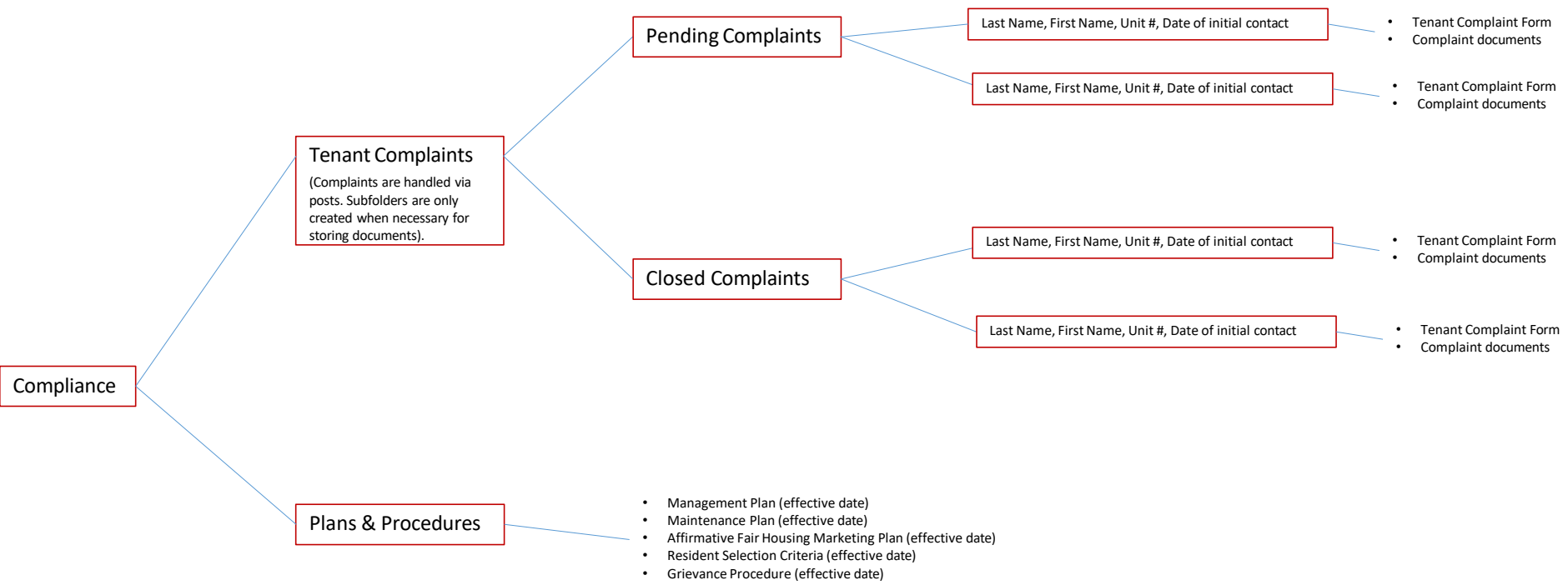
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Financial Data

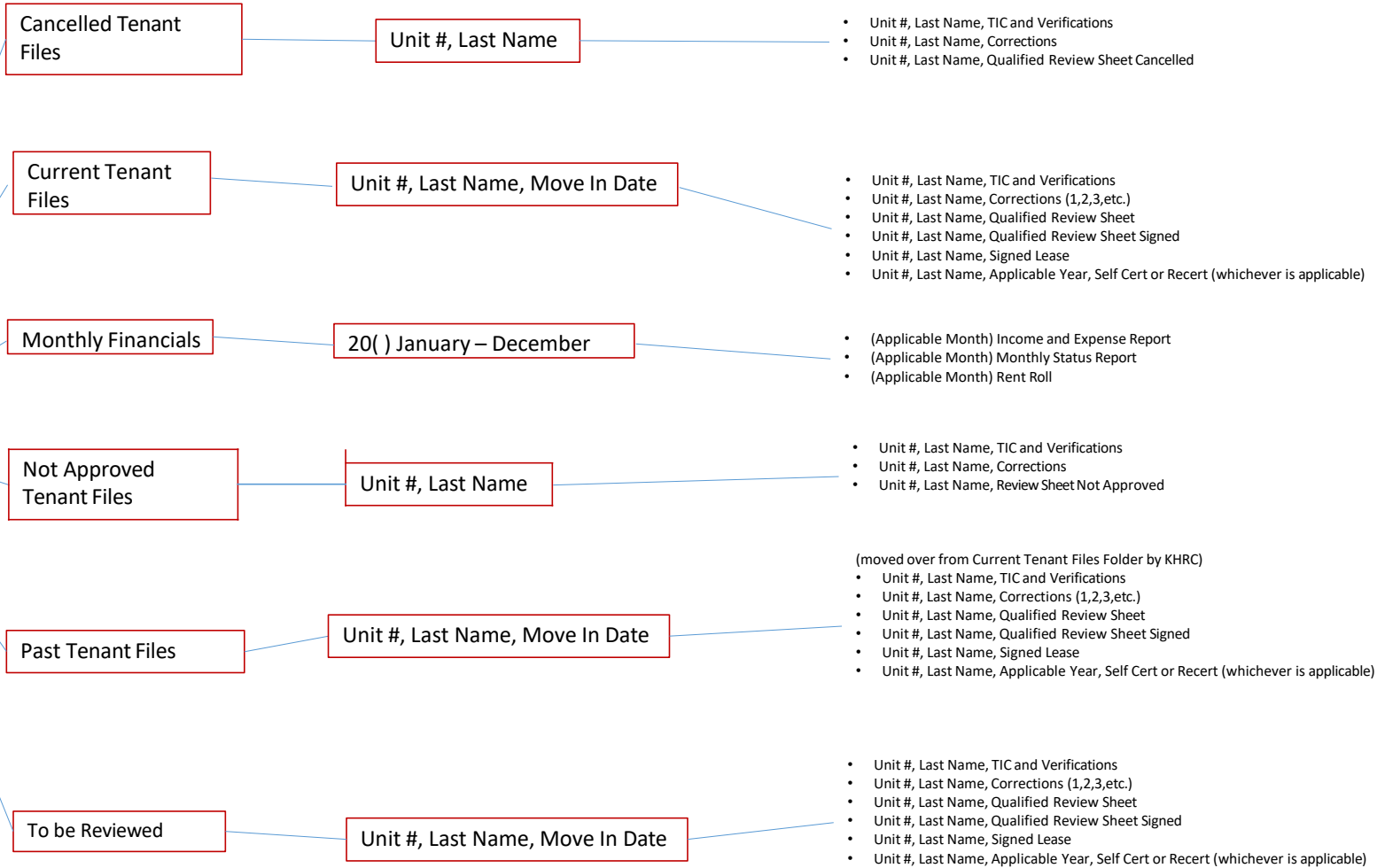
Annual Financials

- Budget Template 20()
- Financials Template 20()

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These folders will ONLY be in the TCAP/CE Work Centers!

TCAP/CE Program



All Files should be named: Procorem Property Name Procorem Number MMDDYYYY Document Name *Please add a space between each

These folders will ONLY be in the Work Centers with Asset Mgmt Agreements!

Asset Management Agreement

Asset Management Agreement

- Asset Management Agreement

Asset Management Invoice

20() Invoices

- (Applicable Month) Invoice

Cancelled Tenant Files

Unit #, Last Name

- Unit #, Last Name, TIC and Verifications
- Unit #, Last Name, Corrections
- Unit #, Last Name, Qualified Review Sheet

Current Tenant Files

Unit #, Last Name, Move In Date

- Unit #, Last Name, TIC and Verifications
- Unit #, Last Name, Corrections (1,2,3,etc.)
- Unit #, Last Name, Qualified Review Sheet
- Unit #, Last Name, Qualified Review Sheet Signed
- Unit #, Last Name, Signed Lease
- Unit #, Last Name, Applicable Year, Self Cert or Recert (whichever is applicable)

Not Approved Tenant Files

Unit #, Last Name

- Unit #, Last Name, TIC and Verifications
- Unit #, Last Name, Corrections
- Unit #, Last Name, Not Approved Review Sheet

Past Tenant Files

Unit #, Last Name, Move In Date

- (moved over from Current Tenant Files Folder by KHRC)
- Unit #, Last Name, TIC and Verifications
 - Unit #, Last Name, Corrections (1,2,3,etc.)
 - Unit #, Last Name, Qualified Review Sheet
 - Unit #, Last Name, Qualified Review Sheet Signed
 - Unit #, Last Name, Signed Lease
 - Unit #, Last Name, Applicable Year, Self Cert or Recert (whichever is applicable)

To be Reviewed

Unit #, Last Name, Move In Date

- Unit #, Last Name, TIC and Verifications
- Unit #, Last Name, Corrections (1,2,3,etc.)
- Unit #, Last Name, Qualified Review Sheet
- Unit #, Last Name, Qualified Review Sheet Signed
- Unit #, Last Name, Signed Lease
- Unit #, Last Name, Applicable Year, Self Cert or Recert (whichever is applicable)

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Procorem Document Naming Matrix:

HOME only work centers

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EXAMPLE: Happy Living Villas CH-02-25 60999 08302022 Annual Report Property's Response to 60 day Notice

*All documents should be uploaded as a PDF, except for the Excel documents listed below:

Financials (submitted with the annual report when 10 or more HOME units)

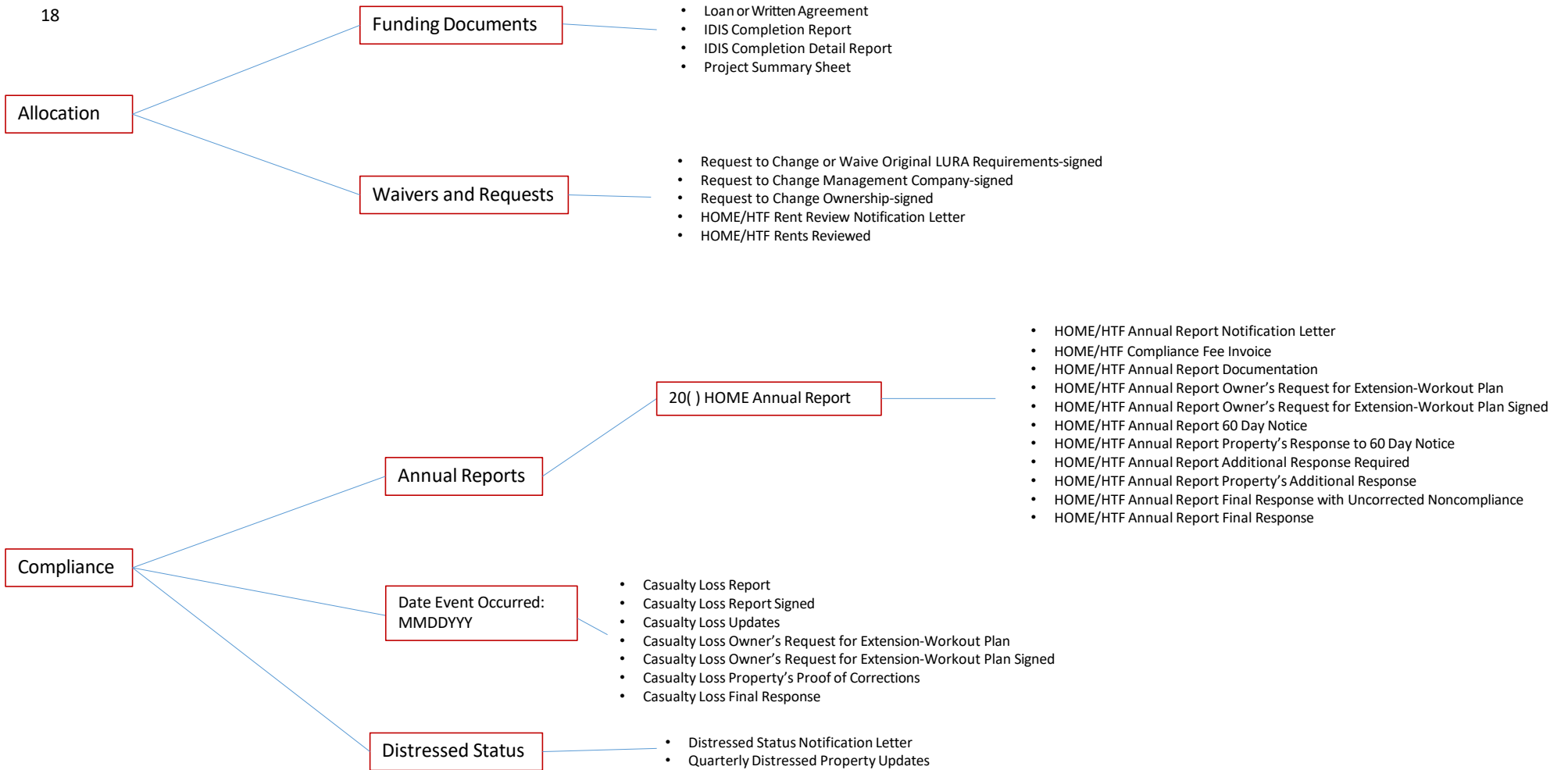
Budget (submitted with the annual report when 10 or more HOME units)

Property Upload Data Sheet (new properties only)

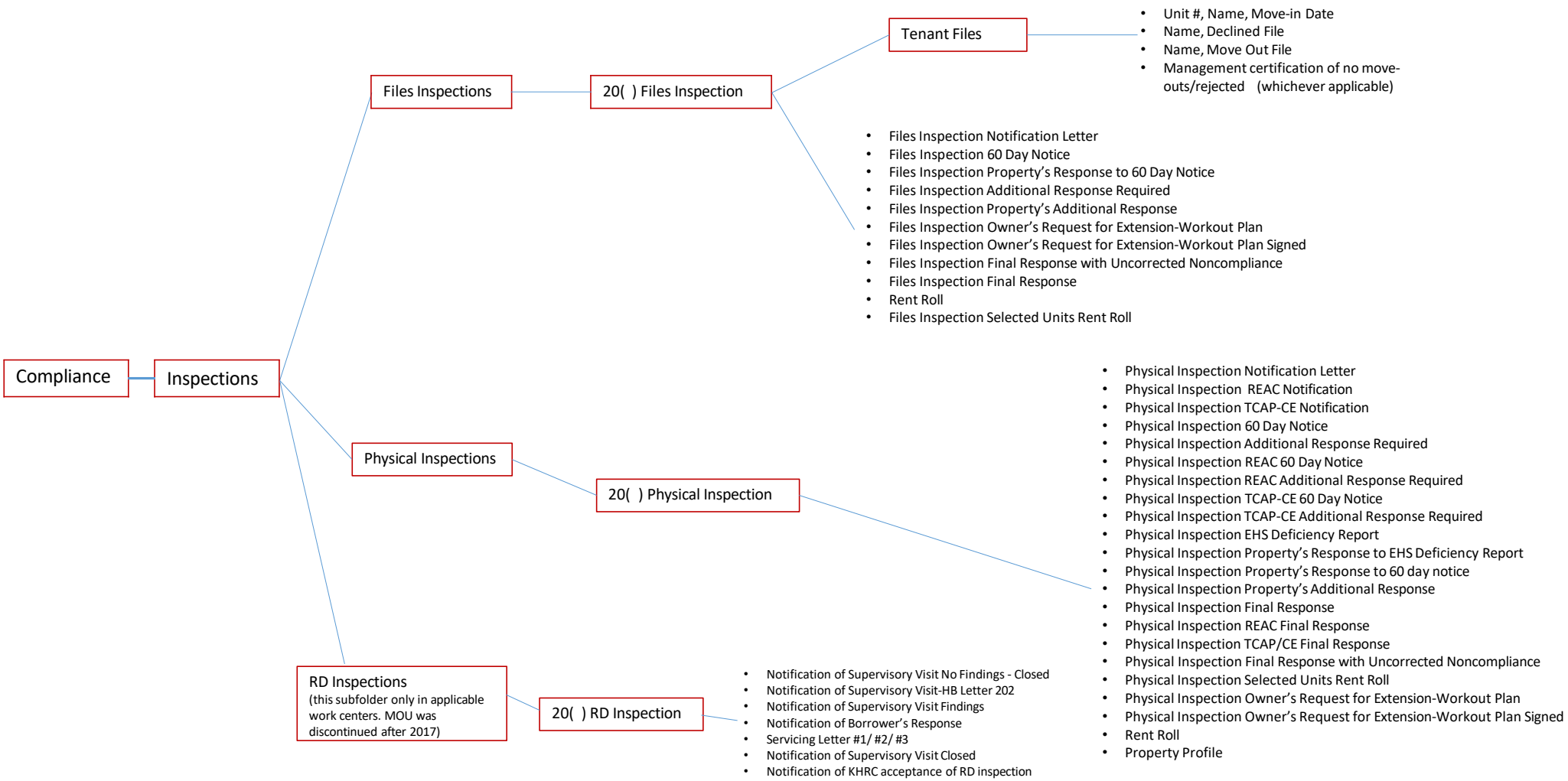
Property Information Template (new properties only)

HOME and HTF Rent Review Spreadsheets

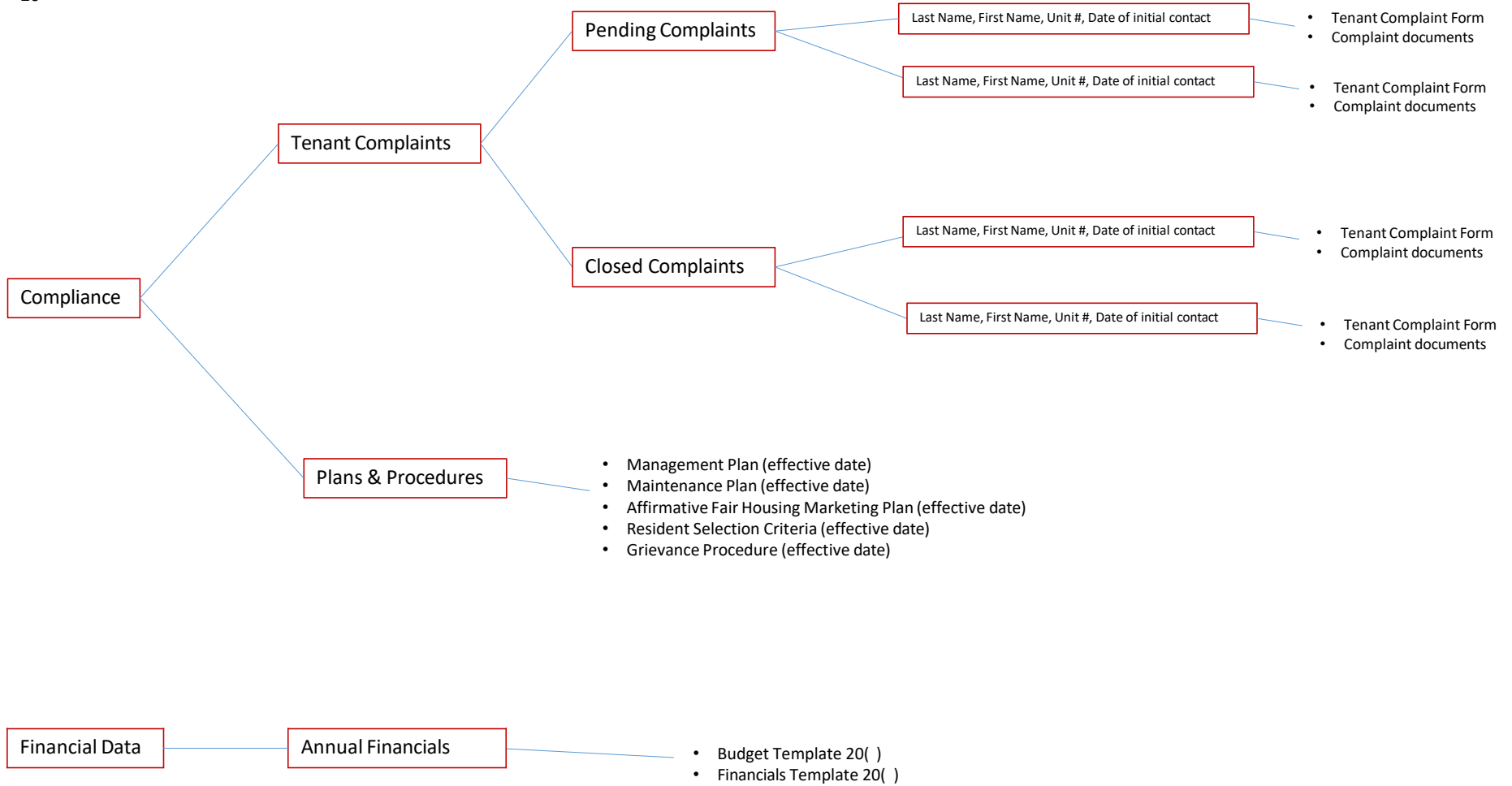
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