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## Contact Information

**Mailing Address:**

TDHCA  
PO Box 13941  
Austin, TX 78711-3941

**Physical Address:**

TDHCA  
221 East 11<sup>th</sup> Street  
Austin, TX 78701

**Website:** <https://www.tdhca.texas.gov>

**Email:** [multifamilycompliance@tdhca.texas.gov](mailto:multifamilycompliance@tdhca.texas.gov)

**Division Phone Number:** (512) 305-8869  
or (800) 525-0657 (toll free in Texas only)

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## Announcements

### Schedule:

- The webinar and open forum will run from 9:00 am until approximately 11:30 am
- We will take a break mid-morning to shift from the webinar to the open forum
- Staff will be present to answer any questions

### Housekeeping:

- Certificates **will not** be emailed but you will receive an email confirming your attendance, usually within 24-hours in an email from the GoTo Platform, please check your “junk” folders as we cannot reissue these emails
  - If you did not use your emailed link for the training from your registration you will not receive a follow-up email or show as having attended the webinar
- We suggest you silence your phones and put an “out of office” email response to help avoid distractions during the training
- Please pose questions and comments to the “Questions Box”

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## Resources

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## TDHCA (Department) Resources

- **Main Compliance Page**
  - <https://www.tdhca.texas.gov/compliance>
- **Compliance Manuals & Rules**
  - <https://www.tdhca.texas.gov/compliance-manuals-and-rules>
- **Compliance Forms**
  - <https://www.tdhca.texas.gov/compliance-forms>
- **Compliance Reports**
  - <https://www.tdhca.texas.gov/compliance-reports>
- **Compliance Utility Allowance Information**
  - <https://www.tdhca.texas.gov/compliance-utility-allowance-information>
- **Income and Rent Limits**
  - <https://www.tdhca.texas.gov/income-and-rent-limits>
- **Compliance Training**
  - <https://www.tdhca.texas.gov/compliance-training>
- **Compliance Frequently Asked Questions (FAQs)**
  - <https://www.tdhca.texas.gov/compliance-frequently-asked-questions-faqs>
- **Compliance Division Staff**
  - <https://www.tdhca.texas.gov/compliance-division-staff>



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## General Resources

- **Compliance Monitoring Rules**
  - [https://texas-sos.appianportalsgov.com/rules-and-meetings?chapter=10&interface=VIEW\\_TAC&part=1&subchapter=F&title=10](https://texas-sos.appianportalsgov.com/rules-and-meetings?chapter=10&interface=VIEW_TAC&part=1&subchapter=F&title=10)
- **26 US Code §42 Low-Income Housing Credit**
  - <https://www.law.cornell.edu/uscode/text/26/42>
- **26 U.S. Code § 142 Exempt Facility Bond**
  - <https://www.law.cornell.edu/uscode/text/26/142>
- **Guide for Completing Form 8823**
  - <https://www.irs.gov/pub/irs-pdf/p5913.pdf>
- **HOME Final Rule**
  - <https://www.hudexchange.info/programs/home/home-final-rule/>



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## Acronyms and Information

- **Compliance Monitoring and Tracking System (CMTS)**
- **Unit Status Report (USR)**
- **Land Use Restriction Agreement (LURA)**
- **Utility Allowance (UA)**
- **Gross Rent Calculation**
  - Tenant Rent + Utility Allowance + Mandatory Fee + Housing if MFDL = Net Allowable Rent
- **Rent and Income Tool**
  - This is a resource the Department develops and makes available to housing partners based on the Income Limits issued annually by Housing and Urban Development (HUD).



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## The Unit Status Report



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## CMTS Reporting: Login to CMTS

### Overview

Welcome to the Compliance Monitoring and Tracking System (CMTS). This system allows owners to submit required reports, such as the Unit Status Report (USR) and the Annual Owners Compliance Report (AOCR) and submit documentation directly to the Department.

### Login to the CMTS

If you have already received your user id and password from

[Login to CMTS](#)

CMTS User Guidelines

To ensure that information is properly entered into CMTS, p

- [Attaching Documents to CMTS \(PDF\) \\*\\*\\*NEW\\*\\*\\*](#)

To use the CMTS Unit Upload feature for uploading household that document, the file layouts and field definitions for the

Visit the [Compliance Reports](#) page for additional information.

Visit the [Trainings Presentation](#) page for CMTS training.

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## CMTS Reporting

ID	Property Name	Annual Owners Compliance Reports	Unit Status Reports	Actions
1255	Hillcrest House	Annual Owners Compliance Reports - 2018	Start New Report	Unit Status Report
1247	Vibes on South Street	Annual Owners Compliance Reports - 2018	Start New Report	Unit Status Report
4618	Carson Marie Terrace	Annual Owners Compliance Reports - 2018	Unit Status Report	Update Contact Information
5263	Pathways at Gaston Place	Annual Owners Compliance Reports - 2018	Unit Status Report	Update Contact Information

Property ID	Property Name	Year	Units	Family	Household	Building	Year	Units	Family	Household	Building
1255	Hillcrest House	2018	1	1	1	1	2018	1	1	1	1
1247	Vibes on South Street	2018	1	1	1	1	2018	1	1	1	1
4618	Carson Marie Terrace	2018	1	1	1	1	2018	1	1	1	1
5263	Pathways at Gaston Place	2018	1	1	1	1	2018	1	1	1	1

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## CMTS Reporting

### Manager's View of CMTS

**Your Property Listings**

Property ID	Property Name	Annual Owners Compliance Reports	8609 Part I Report	Unit Status Report	Update Contact Information	Edit Manager Password	Reports	Electronic Document Attachment
4651	Beverly Garden Apartments			<a href="#">Unit Status Report</a>	<a href="#">Update Contact Information</a>		<a href="#">Reports</a>	<a href="#">Attachments (0)</a>

[Logout](#)

Texas Department of Housing and Community Affairs (TDHCA)

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## Monitor Review Questionnaire

**CMTS Property Reporting System**

**cpollei Property Listings**

Property ID	Property Name	Annual Owners Compliance Reports	8609 Part II Report	Unit Status Report	Update Contact Information	Edit Manager Password	Reports	Unit Data Upload	Tenant Data Upload	Electronic Document Attachment
4793	Oasis Cove	<a href="#">Annual Owners Compliance Reports - 2021</a>	<a href="#">Start New Report</a>	<a href="#">Unit Status Report</a>	<a href="#">Update Contact Information</a>	<a href="#">Edit Manager's Password</a>	<a href="#">Reports</a>	<a href="#">Upload Unit Household Data</a>	<a href="#">Upload Tenant Data</a>	<a href="#">Attachments (68)</a>
5627	Greenline North	<a href="#">Annual Owners Compliance Reports - 2021</a>		<a href="#">Unit Status Report</a>	<a href="#">Update Contact Information</a>	<a href="#">Edit Manager's Password</a>	<a href="#">Reports</a>	<a href="#">Upload Unit Household Data</a>	<a href="#">Upload Tenant Data</a>	<a href="#">Attachments (1)</a>

[Logout](#)

Texas Department of Housing and Community Affairs (TDHCA)

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## Monitor Review Questionnaire

App=STAGE DB=STAGE

Texas Department of Housing and Community Affairs

CMTS Property Reporting System

Update Property Information | Enter Unit Occupancy | Print Unit Status Report | **Unit Status Reports** | Vacancy Clearinghouse | Add and Edit Buildings | Add and Edit Units

Property Selection | Logout

Property ID: 4793  
Property Name: Oasis Cove

**Property#4793 Detail**

Name: Oasis Cove	Type: Individual/Family	Scattered site: N
Building config: Five+ Units Per Building	Dwelling type: Multi Family Residential	Year constructed: 2013
Total buildings: 5	Total units: 64	Total program units: 64
Planned buildings: 5	Planned units: 64	Zoning: R
Total sq ft: 61880	Land site cdf: 1	Elevator: N
Disposition: 1	Home funding: N	Floors in tallest bldg: 2
Special needs: 1	Home 40/50: N	Fair Housing Construction: N
# of parking spots: 1	First building in svc date: 10/17/2013	Next RD onsite rvw date: 12/16/2013
# of handicap spots: 1	Last building svc date: 12/16/2013	Last RD onsite rvw date: 12/16/2013
Census Tract: 48211950300	Latitude: 35.9169	Longitude: -100.3762
GPS Date: 01/11/2017	RAD Development: 1	Property Status: Active
HTC Type: 9%	Disaster Housing Flag: N	
Legal description: 1		

**Program Income Requirements**

**Income**

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## Monitor Review Questionnaire

App=STAGE DB=STAGE

Texas Department of Housing and Community Affairs

CMTS Property Reporting System

Property ID: 4793  
Property Name: Oasis Cove

**Unit Status Reports**

Report Type	Due Date	Submitted Date	Submit	Print
Unit Status Report / Desk - Quarterly Vacancy Report	10/10/21	Has not been submitted	[Submit]	Preview before submitting
Unit Status Report / Desk - Quarterly Vacancy Report	07/10/21	07/09/21	[Submit]	Print USR PDF / Excel
Unit Status Report - Part B / Desk - Annual Owners Compliance Reports	04/20/21	Has not been submitted	[Submit]	Preview before submitting
Unit Status Report - Part B / Desk - Annual Owners Compliance Reports	04/20/21	04/08/21	[Submit]	Print USR PDF / Excel
Unit Status Report / Desk - Quarterly Vacancy Report	04/10/21	04/08/21	[Submit]	Print USR PDF / Excel
Unit Status Report / Desk - Quarterly Vacancy Report	01/10/21	01/18/21	[Submit]	Print USR PDF / Excel
Unit Status Report / Desk - Quarterly Vacancy Report	10/10/20	10/08/20	[Submit]	Print USR PDF / Excel
Unit Status Report - Part B / Desk - Annual Owners Compliance Reports	07/15/20	04/16/20	[Submit]	Print USR PDF / Excel
Unit Status Report / Desk - Quarterly Vacancy Report	07/10/20	07/10/20	[Submit]	Print USR PDF / Excel
Unit Status Report / Desk - Quarterly Vacancy Report	04/10/20	04/16/20	[Submit]	Print USR PDF / Excel
Unit Status Report / Desk - Quarterly Vacancy Report	01/10/20	01/10/20	[Submit]	Print USR PDF / Excel
Unit Status Report / Desk - Quarterly Vacancy Report	10/10/19	10/08/19	[Submit]	Print USR PDF / Excel
Unit Status Report / Desk - Quarterly Vacancy Report	07/10/19	07/11/19	[Submit]	Print USR PDF / Excel
Unit Status Report - Part B / Desk - Annual Owners Compliance Reports	04/20/19	04/30/19	[Submit]	Print USR PDF / Excel
Unit Status Report / Desk - Quarterly Vacancy Report	04/10/19	04/30/19	[Submit]	Print USR PDF / Excel
Unit Status Report / Onsite	04/02/19	04/02/19	[Submit]	Print USR PDF / Excel
Unit Status Report / Desk - Quarterly Vacancy Report	01/10/19	01/02/19	[Submit]	Print USR PDF / Excel
Unit Status Report / Desk - Quarterly Vacancy Report	10/10/18	10/11/18	[Submit]	Print USR PDF / Excel
Unit Status Report / Desk - Quarterly Vacancy Report	07/10/18	07/10/18	[Submit]	Print USR PDF / Excel
Unit Status Report - Part B / Desk - Annual Owners Compliance Reports	04/20/18	04/29/18	[Submit]	Print USR PDF / Excel
Unit Status Report / Desk - Quarterly Vacancy Report	04/10/18	03/27/18	[Submit]	Print USR PDF / Excel

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## The Income and Rent Tool

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### Income and Rent Limits

#### Income Limits

Published by  
HUD  
Annually

Project  
Specific

Based on  
household  
size

#### Rent Limits

Calculated  
from Income  
Limits

Project  
Specific

Based on  
unit size



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## Income and Rent Limit Tool: Where is it?

### Income and Rent Limits

If you or someone you know is in need of assistance, please visit our [Help for Texans Page](#).

[Help for Texans](#)

#### Helpful Tools

- [Reasonable Accommodation and Reasonable Modification Infographic](#)
- [Tenant Handout: Income and Rent Limits](#) [English \(PDF\)](#) [Spanish \(PDF\)](#)
- [Income and Rent Limits in TDHCA-Supported Properties](#)
- [Archived Income and Rent Limits](#)

### Housing Tax Credit, Tax Exempt Bond, HOME, Neighborhood Stabilization and Housing Trust Fund rental development programs

[Income and Rent Tool](#)

<https://www.tdhca.texas.gov/income-and-rent-limits>

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## Income and Rent Limit Tool: Where is it?

### Income and Rent Tool

The 2023 Housing Tax Credit limits are effective 5/15/2023. The NSP income limits are effective 6/15/2023. The Community Planning Division (CPD) of HUD released the 2023 HOME Program income limits effective 6/15/2023 and rent limits that are effective for all new leases and lease renewals after 6/15/2023. The National Housing Trust Fund income and rent limits are effective 6/15/2023.

County:	TRAVIS
Financing:	9% Housing Credits
Place:	Austin
Project PIS Date:	04/01/2021-05/16/2021
Carryover/Determination Notice/Subaward Agreement date:	05/17/2018-04/23/2019
For Home and NSP Only:	On or Before 06/14/2023
<input type="button" value="Submit"/>	

<https://www.tdhca.texas.gov/income-and-rent-limits>

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## Income and Rent Limit Tool: Where is it?

<https://www.tdhca.texas.gov/income-and-rent-limits>

County: TRAVIS  
 Financing: 9% Housing Credits  
 Place: Austin  
 Project PIS Date: 04/01/2021-05/16/2021  
 Carryover/Determination Notice/Subaward Agreement date: 05/17/2018-04/23/2019  
 For Home and NSP Only: On or Before 06/14/2023  
 Submit Bookmark

MTSP Median Income : 122300

**Income Limits**

Income	1	2	3	4	5	6	7	8
20	16360	18700	21040	23360	25240	27100	28980	30840
30	24540	28050	31560	35040	37860	40650	43470	46260
40	32720	37400	42080	46720	50480	54200	57960	61680
50	40900	46750	52600	58400	63100	67750	72450	77100
60	49080	56100	63120	70080	75720	81300	86940	92520
70	57260	65450	73640	81760	88340	94850	101430	107940
80	65440	74800	84160	93440	100960	108400	115920	123360

**Rent Limits**

Rent	0	1	2	3	4	5
20	409	438	526	607	677	747
30	613	657	789	911	1016	1121
40	818	876	1052	1215	1355	1495
50	1022	1095	1315	1518	1693	1869
60	1227	1314	1578	1822	2032	2243
70	1431	1533	1841	2126	2371	2617
80	1636	1753	2104	2430	2710	2991

[print to pdf]

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## Income and Rent Limit Tool: 4% Housing Tax Credit & BOND

**For a 4% Tax Credit property, the effective date of the Determination Notice should be used.**

1a Date of Allocation ▶ ..... b Maximum housing credit dollar amount allowable ..... 1b 136,982

2 Maximum applicable credit percentage allowable (see instructions) ..... 2 3.15%

3a Maximum qualified basis ..... 3a 4,348,635

b Check here ▶ ☒ if the eligible basis used in the computation of line 3a was increased under the high-cost area provisions of section 42(d)(5)(B). Enter the percentage to which the eligible basis was increased (see instructions) ..... 3b 130%

4 Percentage of the aggregate basis financed by tax-exempt bonds (If zero, enter -0-) ..... 4 69.58%

5 Date building placed in service ..... 12/29/2017

6 Check the boxes that describes the allocation for the building (check those that apply):

a ☒ Newly constructed and federally subsidized b ☐ Newly constructed and not federally subsidized c ☐ Existing Building

d ☐ Sec. 42(e) rehabilitation expenditures federally subsidized e ☐ Sec. 42(e) rehabilitation expenditures not federally subsidized

f ☐ Allocation subject to nonprofit set-aside under sec. 42(h)(5)

**Effective Date of Determination Notice** AUGUST 5, 2016

**Expiration Date of Determination Notice** SEPTEMBER 6, 2016

\* The BIN numbers noted should be used in any future correspondence with the Department.

Funding: 4% HTC  
 County: Tarrant  
 Place: Fort Worth  
 Placed in Service Date: 12/29/2017  
 Effective Date of Determination Notice: 8/5/2016

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## Income and Rent Limit Tool: 9% Housing Tax Credit


1a Date of Allocation ▶	12/12/2016	b Maximum housing credit dollar amount allowable	1b	462,000
2 Maximum applicable credit percentage allowable (see instructions)			2	9.00%
3a Maximum qualified basis			3a	5,133,333
b Check here <input checked="" type="checkbox"/> if the eligible basis used in the computation of line 3a was increased under the high-cost area provisions of section 42(d)(5)(B). Enter the percentage to which the eligible basis was increased (see instructions)			3b	130%
4 Percentage of the aggregate basis financed by tax-exempt bonds (If zero, enter -0-)			4	0.00%
5 Date building placed in service	12/20/2018			
6 Check the boxes that describes the allocation for the building (check those that apply):				
a <input type="checkbox"/> Newly constructed and federally subsidized b <input type="checkbox"/> Newly constructed and not federally subsidized c <input type="checkbox"/> Existing Building				
d <input type="checkbox"/> Sec. 42(g) rehabilitation expenditures federally subsidized e <input checked="" type="checkbox"/> Sec. 42(e) rehabilitation expenditures not federally subsidized				
f <input type="checkbox"/> Allocation subject to nonprofit set-aside under sec. 42(h)(5)				

**For a 9% Tax Credit property, the Department's signature date on the Carryover Agreement.**

**Funding: 9% HTC**  
**County: Hale**  
**Place: Plainview**  
**Placed in Service Date: 12/20/2018**  
**Carryover Agreement Date: 12/12/2016**

Acknowledged, agreed, and accepted:


DEPARTMENT:  
**TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS**, a public and official agency of the State of Texas

By:   
 Margaret L. Holloway, Director of Multifamily Finance  
 221 E. 11th Street, Austin, Texas 78701  
 Department Taxpayer Identification Number: 74-2610542

THE STATE OF TEXAS §  
 COUNTY OF TRAVIS §

BEFORE ME, the undersigned, a Notary Public in and for the State of Texas, on this day personally appeared Margaret L. Holloway, duly authorized representative of the **TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS**, a public and official agency of the State of Texas, on behalf of such agency.

GIVEN UNDER MY HAND AND SEAL OF OFFICE this 12<sup>th</sup> day of December, 2016.

(Seal)  
  
 Melissa M. Whitehead  
 Notary Public, State of Texas

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## Income and Rent Limit Tool: Exchange


1a Date of Allocation ▶		b Maximum housing credit dollar amount allowable	1b	0
2 Maximum applicable credit percentage allowable (see instructions)			2	
3a Maximum qualified basis			3a	
b If the eligible basis used in the computation of line 3a was increased, check the applicable box and enter the percentage to which the eligible basis was increased (see instructions)			3b	
<input type="checkbox"/> Building located in the Gulf Opportunity (GO) Zone, Rita GO Zone, or Wilina GO Zone <input type="checkbox"/> Section 42(d)(5)(B) high cost area provisions				
4 Percentage of the aggregate basis financed by tax-exempt bonds (If zero, enter -0-)			4	0.00%
5 Date building placed in service	10/17/2011			
6 Check the boxes that describes the allocation for the building (check those that apply):				
a <input type="checkbox"/> Newly constructed and federally subsidized b <input checked="" type="checkbox"/> Newly constructed and not federally subsidized c <input type="checkbox"/> Existing Building				
d <input type="checkbox"/> Sec. 42(g) rehabilitation expenditures federally subsidized e <input type="checkbox"/> Sec. 42(e) rehabilitation expenditures not federally subsidized				
f <input type="checkbox"/> Not federally subsidized by reason of 40-50 rule under sec. 42(i)(2)(E) g <input type="checkbox"/> Allocation subject to nonprofit set-aside under sec. 42(h)(5)				

**For an Exchange property, the execution date of the property's Subaward Agreement should be used.**

**Funding: HTC Exchange**  
**County: Kendall**  
**Place: Comfort**  
**Placed in Service Date: 10/17/2011**  
**Carryover Agreement Date: 11/30/2010**


IN WITNESS WHEREOF, each of the Parties has executed this Agreement as of the date first written above.


DEPARTMENT: **TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS**, a public and official agency of the State of Texas

By:   
 Name: Robbye G. Meyer  
 Its duly authorized representative

Department Address: 221 E. 11th Street, Austin, Texas 78701

SUBSCRIBED AND SWORN TO before me this 30 day of November, 2010.

  
 Notary Public in and for the State of Texas

  
 MISHAEL ARROYO  
 Notary Public, State of Texas  
 My Commission Expires 10/24/2011  
 NOTARY WITHOUT BOND

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## Income and Rent Limit Tool: HOME – TCAP/RF – HOME ARP

### LAND USE RESTRICTION AGREEMENT (Multifamily Properties)

THE STATE OF TEXAS §  
§  
COUNTY OF [REDACTED] §

THIS LAND USE RESTRICTION AGREEMENT ("Agreement" or "LURA"), executed to be effective the 30<sup>th</sup> day of October, 2019, is by and between [REDACTED], a Texas limited partnership ("Owner"), and the TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS, a public and official agency of the State of Texas ("Department").

Funding: HOME  
County: Lubbock  
Place: Slaton  
Placed in Service Date: N/A  
Carryover Agreement Date: N/A

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## Income and Rent Limit Tool: National Housing Trust Fund

### LAND USE RESTRICTION AGREEMENT (Multifamily Properties)

THE STATE OF TEXAS §  
§  
COUNTY OF [REDACTED] §

THIS LAND USE RESTRICTION AGREEMENT ("Agreement" or "LURA"), executed to be effective the 15th day of September, 2023, is by and between [REDACTED], a Texas limited partnership ("Owner"), and the TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS, a public and official agency of the State of Texas ("Department").

Funding: NHTF  
County: Moore  
Place: Dumas  
Placed in Service Date: N/A  
Carryover Agreement Date: N/A

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## Income and Rent Limit Tool: Neighborhood Stabilization Program

### LAND USE RESTRICTION AGREEMENT (Multifamily Properties)

THE STATE OF TEXAS §  
COUNTY OF [REDACTED] §

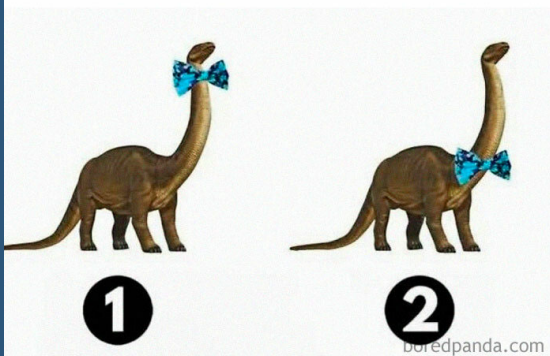
THIS LAND USE RESTRICTION AGREEMENT ("Agreement" or "LURA"), executed to be effective the 1<sup>st</sup> day of June, 2019, is by and between [REDACTED], a Texas limited partnership ("Leasehold Owner"), and the TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS, a public and official agency of the State of Texas ("Department").

**Funding: NSP**  
**County: Tarrant**  
**Place: Fort Worth**  
**Placed in Service Date: N/A**  
**Carryover Agreement Date: N/A**

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This is a more serious debate



# THANK YOU!

## USR and Income & Rent Tool

TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS  
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PO BOX 13941, AUSTIN, TEXAS 78711  
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