Wisconsin 2025-26 Qualified Allocation Plan
Appendix H: Electronic Application Submission and Communication Instructions

WHEDA uses a file transmission platform called Procorem to receive applications for financing including Housing Tax Credits (HTC) and WHEDA Loans and to transmit documents to applicants such as Reservation Agreements and other HTC Allocation Documents. Applicants should follow the guidelines within this document to ensure accurate and timely processes.

Application Submission

Procorem WorkCenter
- Before submitting an application for any resource, applicants must request the creation of a project and resource-specific Procorem WorkCenter by following the instructions to complete and submit a WorkCenter Request Form.
- Applicants must upload all required documents for the resource being requested before the applicable deadline in accordance with the file organization and naming conventions established below.
- Note the following restrictions on access to the WorkCenters:
  - Documents cannot be deleted after they have been uploaded to the WorkCenter.
  - WorkCenters will be restricted to view-only mode upon the application deadline and throughout the competitive application review period.

Application File Organization and Naming Conventions
- Documents should be ordered and named to correspond with the numbers and document titles in the Threshold and Self-Scoring checklists included in the MFA Workbook. See example below for formatting.
  - Document names should also include the Tax Credit Number (can be found in the name of the Procorem WorkCenter once created) and Project Name.
- Each numbered item on the checklist should be submitted as a standalone file (not combined with other application materials).
- If a checklist item does not apply to the application, it should be marked as "N/A" in the completed checklist. It is not necessary to include a document to correspond to that item unless explanation of inapplicability is necessary.

  Example:
  - 1 – #0000 – PROJECT NAME – TAX CREDIT APPLICATION FEE
  - 2 – #0000 – PROJECT NAME – APPLICATION CHECKLIST

Communication between WHEDA and Applicants

Use of Procorem Posts
- Applicants should use the "Post" function in Procorem to notify WHEDA of complete submissions for all applications including Applications Two and Three in the HTC program. Failure to complete this step may result in a delayed review of the submission.

Email communication

- When emailing WHEDA staff about a project, applicants should include the project number and name in the subject of the email.
- Applicants may not initiate communication with WHEDA staff regarding a competitive application that is under review. WHEDA staff will contact you if there is any need for communication. Applicants should take care to list the best contact person in the application and note the key deadlines of the program in the Qualified Allocation Plan and WHEDA's website.

Allocation Document Transmission

- WHEDA will use the WorkCenter to transmit electronic documents to Applicants, such as Reservation Agreements and other HTC Allocation Documents.
- After completing a review of Application 1 and Application 2 in the Housing Tax Credit Program, WHEDA will upload a reviewed version of the Multifamily Application. This version should always be used for the subsequent application submission.

    Example:
    - After Application 1 awards are announced, WHEDA will upload a new version of the Multifamily Application (MFA) with review notes and project scores noted. Projects receiving a reservation of credit must use this version of the MFA to make updates for the Application 2 submission.
    - After Application 2 has been processed and approved, WHEDA will upload a new version of the MFA that corresponds to the Carryover or Tier One Letter issued. Applicants must use this version of the MFA to make updates for the Application 3 submission.