Neighborhood Assistance Program Reporting Instructions

Required NAP Reports

The following reports are required:

1. 60% Benchmark (First Half) Donor Report
2. 100% Benchmark (Second Half) Donor Report
3. Closeout Report

Report Name	Due	Report Type
60% Benchmark Report	mid-January	IHCDAOnline
100% Benchmark Report	mid-April	IHCDAOnline
Closeout Report	September after award closes	SurveyMonkey

If your organization's NAP program contact or other staff involved in reporting needs help accessing your account in IHCDAOnline, including registering for the first time, please refer to the Partner's Guide to IHCDAOnline, which can be found here: https://online.ihcda.in.gov/AuthorityOnline/Links.htm.

If your organization has any issues following the instructions in the Partner's Guide, please email claims@ihcda.in.gov.

The SurveyMonkey link for the Closeout Report will be sent to all NAP organizations and posted to the NAP website when it is available.

60% Benchmark Report: due mid-January

The 60% Benchmark (First Half) Donor Report is the first report of the NAP cycle and is due in mid-January, approximately six (6) months after the award date. **It includes all donations received between July 1 and December 31**. This report is electronic and is submitted via IHCDAOnline. **This report must reflect the sale of a minimum of 60% of your organization's total tax credit allocation.** If your agency fails to distribute at least 60% of allocated credits or submit this report on time, you may lose eligibility for the full credit amount in the next NAP program round and any unused credits may be de-allocated. If at any time you have issues with IHCDAOnline, email IHCDA's Financial Operations team at claims@ihcda.in.gov.
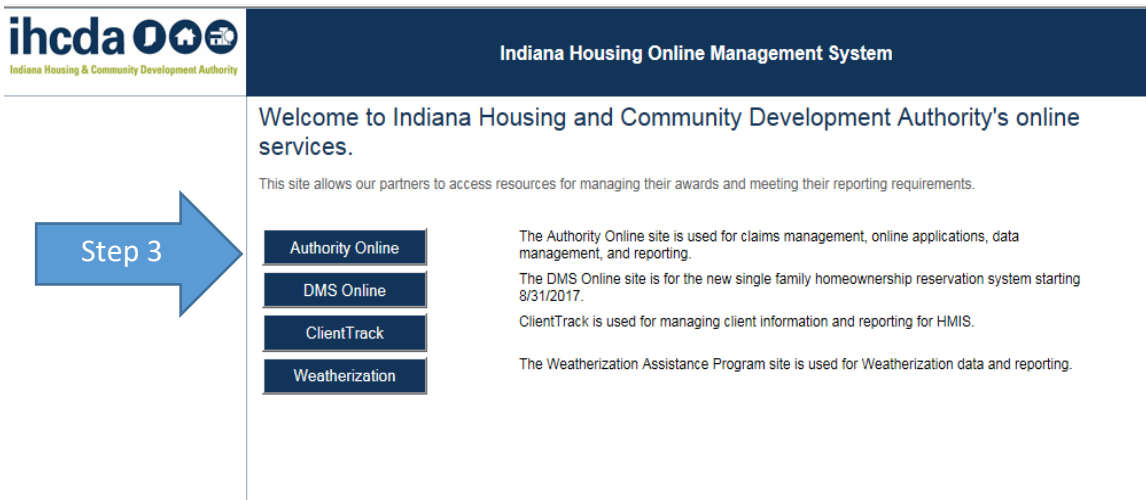
Step 1: Gather all donations received **between July 1 and December 31**. Your agency should be collecting donor information as contributions are received so a list can be ready for the Benchmark report. Before submitting this report, it is important to review all information to ensure it is correct.

To complete this report, your organization will need the **donors' names, social security numbers, dollar amounts donated, and donation dates**.

Please note that there are no forms your organization is required to submit to IHCDA. The only donor information IHCDA requires is what your agency submits on the 60% and 100% Benchmark Reports. However, you are required to keep copies of the Donor Contribution Forms for all donations.

Step 2: Access the **IHCDAOnline** website: https://online.ihcda.in.gov/.

Step 3: Click on **"Authority Online."**

Step 4: Enter login information – **"Username"** and **"Password."**

Step 5: Select **"NAP."** This page may look different depending on the types of awards and contracts your organization has with IHCDA.

Step 6: Choose the correct NAP Contract from the list.

This will bring you to your agency's NAP application cover page.

Step 7: Select **"NAP Semi-Annual Reporting."**

Step 8: Fill out the report.

a) The period for the 60% Benchmark report is **"First Half."** Donations reported on this report must have been made **between July 1 and December 31. Do not enter donations for the 60% Benchmark Report from outside this time frame.**

b) Enter the contribution information for each donor from the Donor Contribution Form and **double check that the information entered is correct.** Incorrect information could put your donor's tax credit and your organization's NAP eligibility at risk.

  i. Name
  ii. Full Social Security Number
  iii. Address
  iv. Donation Amount Eligible for NAP Credits: **the lesser of** the full amount donated **OR** $25,000 **OR** half of the credits your agency has remaining
  v. Donation Date

c) Hit **"Submit Report"** once all of the donor information has been entered.

d) The report will show **"Submitted"** at the top right-hand corner once the process has been completed. **PLEASE CHECK FOR THAT BEFORE EMAILING IHCDA STAFF TO ASK IF YOUR REPORT WAS CORRECTLY SUBMITTED.**

e) Once you hit **"Submit Report,"** the report will show the results for the period which includes the De-allocation benchmark, percentage of credits distributed, and total credits to be de-allocated if the benchmark is not met.

Neighborhood Assistance Prog **8d** **Semi-Annual Reporting**

The report has been submitted to IHCDA for review.

For Award: NAPTEST1 Report Status: Submitted Report Submitted On: 3/11/2020

Award Start Date: 7/1/2017 Award End Date: 6/30/2018

For Period: First Half

View Application

8c

8a

Submit Report

Award Information

Name of Organization:
IHCDA
Award Number:
NAPTEST1
Original Award Amount:
$15,000.00
Total To Be DeAllocated:
$0.00
Total Re-Allocation:
$0.00
Revised Award Amount:
$15,000.00
Credits Sold this Period:
$12,000.00
Total Credits Sold:
$12,000.00
Remaining Credits to be sold:
$3,000.00

Results for Period	
De-Allocation Benchmark:	60.00%
Percentage of Credits Sold:	80.00%
Total Credits to be De-Allocated:	$0.00

8e

8b

Contributors

Delete Selected Contributors

Name / Address	Tax ID # / City	Date / State	Donation Amount / Zip Code
James Jones	111-22-3333	10/21/2017	$16,000.00
1 Main St	Indianapolis	IN	46204
John Doe	111-11-2222	11/2/2017	$7,100.00
2 Main St	Indianapolis	IN	46204
Jane Smith	000-00-0000	12/29/2017	$900.00
3 Main St	Indianapolis	IN	46204

Step 9: Enter Donation Information. (Example: 60% Benchmark Met)

The total that you see in IHCDAOnline for your organization will be the amount of tax credits that your organization has distributed. For example (see figure below):

a) Your agency was allocated $15,000 in tax credits.

b) You enter the following Donor Contributions totaling $6,500:

   i. James Jones: 1 Main St, Indianapolis IN 46204, SSN XXX-XX-3333, $16,000.00 Donation

   ii. John Doe: 2 Main St, Indianapolis, IN 46204, SSN XXX-XX-2222, $7,100.00 Donation

   iii. Jane Smith: 3 Main St, Indianapolis, IN 46204, SSN XXX-XX-0000, $900.00 Donation

c) After entering all of the Donor contributions above in IHCDAOnline, it will show that $12,000.00 in tax credits have been distributed.

   i. Donations/2 = Tax Credits distributed. $24,000.00/2 = $12,000.00

d) You have distributed $12,000.00 of your $15,000.00 awarded NAP credits. This would result in using 80% of your tax credits being distributed, which means your organization has met the 60% Benchmark requirement.

Step 10: Enter Donation Information. (Example: 60% Benchmark **NOT** met)

Here is an example (see figure below) of a report that was submitted that did not meet the 60% Benchmark criteria and may be deallocated credits:

a) Your agency was allocated $15,000 in tax credits.

b) You enter the following Donor Contributions totaling $6,500:

   i. James Jones: 1 Main St, Indianapolis IN 46204, SSN XXX-XX-3333, $450.00 Donation

   ii. John Doe: 2 Main St, Indianapolis, IN 46204, SSN XXX-XX-2222, $3,000.00 Donation

   iii. Jane Smith: 3 Main St, Indianapolis, IN 46204, SSN XXX-XX-0000, $12,000.00 Donation

c) After entering all of the Donor contributions above in IHCDAOnline it will show that $7,725.00 in tax credits have been distributed.

   i. Donations/2 = Tax Credits distributed. $15,450.00/2 = $7,725.00

d) You have distributed $825 out of $5,000 in NAP credits. This would result in using 16.5% of your tax credits being distributed, which means your organization has **NOT** met the 60% Benchmark requirement.

In this case, because your agency did not sell 60% of awarded NAP credits by December 31, any remaining credits may be deallocated (decision announced around February 1).

100% Benchmark Report: due mid-April

The 100% Benchmark (Second Half) Donor Report includes all donations received between **January 1 and March 31**. This report is electronic and is submitted via IHCDAOnline. **This report must reflect a sale of 100% of your organization's total tax credit allocation.** If your agency fails to distribute all allocated NAP credits or submit this report on time, you may lose eligibility for the full credit amount in the next NAP program round. If at any time you have issues with IHCDAOnline, email IHCDA's Financial Operations team at claims@ihcda.in.gov.

Step 1: Gather all donations received between **January 1 and March 31**. Your agency should be collecting donor information as contributions are received so a list can be ready for the Benchmark Report. Before submitting this report, it is important to review all information to ensure it is correct.

To complete this report, your organization will need the **donors' names, social security numbers, dollar amounts donated, and donation dates.**

Please note that there are no forms your organization is required to submit to IHCDA. The only donor information IHCDA requires is what your agency submits on the 60% and 100% Benchmark Reports. However, you are required to keep copies of the Donor Contribution Forms for all donations.

Step 2: Access the **IHCDAOnline** website: https://online.ihcda.in.gov/.

Step 3: Click on **"Authority Online."**

Step 4: Enter login information – **"Username"** and **"Password."**

Step 5: Select **"NAP."** This page may look different depending on the types of awards and contracts your organization has with IHCDA.

Step 6: Choose the correct NAP Contract from the list.

This will bring you to your agency's NAP application cover page.

Step 7: Select **"NAP Semi-Annual Reporting."**

Step 8: Fill out the report**.**

a) The period for the 100% Benchmark report is **"Second Half."** To access the second half report, you will need to change the "For Period" drop down to "Second Half." Donations reported on this report must have been made **on or after January 1**. **Do not enter donations for the 100% Benchmark Report from outside this time frame.**

b) Enter the contribution information for each donor and **double check that the information entered is correct.** Incorrect information could put your donor's tax credit and your organizations NAP eligibility at risk.

   i) Name
   ii) Full Social Security Number
   iii) Address
   iv) Donation Amount Eligible for NAP Credits: **the lesser of** the full amount donated **OR** $25,000 **OR** half of the credits your agency has remaining
   v) Donation Date

c) Hit the **"Submit Report"** once all of the donor information has been entered.

d) The report will show **"Submitted"** at the top right-hand corner once the process has been completed. **PLEASE CHECK FOR THAT BEFORE EMAILING IHCDA STAFF TO ASK IF YOUR REPORT WAS CORRECTLY SUBMITTED.**

e) Once you hit **"Submit Report,"** the report will show the results for the period, which includes the percentage of credits distributed.

For examples of how to complete this report, please refer to the "60% Benchmark Report" section above. The process for the 100% Benchmark Report is the same as for the 60% Benchmark Report with the exception of the "Period," which will now show as "Second Half," and the "De-allocation Benchmark," which will now show as "100%."

Additionally, the 100% Benchmark Report report is **NOT** required if your organization **sold 100% of credits by December 31, accurately reported all donations on the 60% Benchmark Report, and did not receive any additional re-allocated credits**.

If your agency fails to sell 100% of credits by March 31, these credits will NOT be deallocated. You should continue to sell credits until you reach 100% or through June 30, whichever occurs first, and ensure any additional donors are reported to IHCDA.

Closeout Report: due September after award closes

y · · · · · " · · · · k · · · · · **the purpose of Expenditure Closeout Report is NOT to report donor information but rather to report information to IHCDA on how your organization has spent the funds you have raised using the awarded credits you sold.** As such, this report is **due in September after the NAP award cycle closes** in order to allow time for your organization to utilize these funds.

Rather than being completed in IHCDAOnline, the Closeout Report is completed in SurveyMonkey (previously completed through Jotform prior to the 2023-24 NAP Program Year). The link for this report will be **emailed to your agency's Executive Director and NAP program contact person** and will also be **posted to the NAP webpage on IHCDA's partner website**, which is located here: https://www.in.gov/ihcda/program-partners/neighborhood-assistance-program-nap/.

If your organization does not receive the link and cannot find it on IHCDA's website by at least two weeks before the report deadline, contact IHCDA staff at nap@ihcda.in.gov. **Not receiving the link directly is not an acceptable reason for a late report.**

The Closeout Report is REQUIRED, even if your organization was not required to complete the 100% Benchmark Report. The only exception to this is if your organization did not sell ANY of your awarded NAP credits.

If your organization does not submit the Closeout Report on time by the September due date, you will lose eligibility for the for the following NAP program cycle for which credits have not already been awarded. If your organization does not submit the Closeout Report at all, you will lose eligibility for the next three (3) NAP program cycles for which credits have not already been awarded.

For example:
- If your organization was awarded NAP credits for the 2023-24 Program Year (July 1, 2023 - June 30, 2024), your Closeout Report would be due in late September of 2024.
- If your Closeout Report was submitted late (after the due date at 5 PM ET), your organization would lose eligibility for the 2025-26 NAP Program Year beginning, July 1, 2025 (since the 2024-25 Program Year would already have begun). The next program cycle your organization would be eligible to participate in would be the 2026-27 Program Year (July 1, 2026 - June 30, 2027).
- If your organization did not submit a Closeout Report at all, you would lose eligibility for the 2025-26, 2026-27, and 2027-28 NAP Program Years. Your next eligible program cycle would be the 2028-29 Program Year (July 1, 2028 - June 30, 2029).

For a timeline and specific due dates for the current NAP Program Year, please visit the NAP webage on the IHCDA website.