Agreement Report (Attestations) Guide

National Housing Strategy

Canada

CMHC ◆ SCHL

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Purpose of the Agreement Report Guide

This guide provides the necessary information to assist proponents on how to complete the reporting for HAF through CMHC's portal. This includes instructions on how to provide an update on the action plan commitments and initiatives and how to submit the permit data, use of HAF funding, capital projects, and a signed attestation report.

Login to the CMHC Portal

Creating an Account & Profile

If you have used the CMHC portal before, proceed to the next section, "Returning to the CMHC Portal?".

Whether you are managing agreement reports for your own organization or on behalf of a third party, you must create a profile in the CMHC portal before you can submit an agreement report.

On the portal login page, select "**Don't have an account? Sign up now.**"

Enter your email address and click, "Send verification code." An automated email will be sent to your email address with the code. Enter this code in the field for the verification and click "Verify Code."

For more information on how to create a profile in the CMHC portal, refer to the "CMHC Portal: How to Create a Profile and Start an Application" guide.

Your personal and organization information is saved under "My Profile" and "Organization Profile", which you can access at any time. You will be asked to provide contact information for yourself and your organization.

> **Note: To protect your privacy and make sure you receive communications, approvals, and/or payments from CMHC in a timely manner, your organization's profile will be placed on hold until CMHC can validate the Legal Name and other information and make any necessary changes. While you wait, you will not be able to proceed any further. The timeline for approval should take no more than 2 business days, and once the hold has been removed you can proceed with completing the agreement report.**

Returning to the CMHC Portal?

1. Login to the <u>CMHC portal</u>. Once logged in, you will be presented with the "My Applications" page. In the "Assisted Housing" dropdown, click on "My Activities".
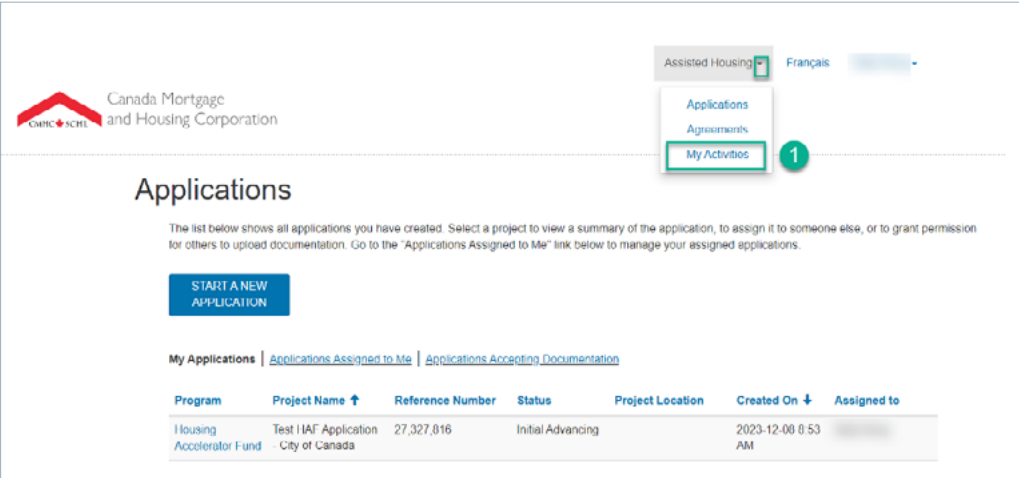
Semi-Annual Agreement Report (First Reporting Period)

As part of the HAF reporting requirements, proponents must submit to CMHC a semi-annual agreement report (first reporting period), which will include:

– A signed attestation letter from the CFO or equivalent

– A completed capital projects report, and

– Provide the next scheduled review date for the Housing Needs Assessment report (if applicable)

A CMHC representative will contact proponents with a reminder to complete the agreement report through the CMHC portal. This agreeemnt report will be available for proponents to complete 4 months after the effective date of the contribution agreement. The due date to submit this report is 6 months after the effective agreement date as outlined in the contribution agreement.

Download and Complete the Reporting Templates

The reporting templates for all reporting periods can be found in the "My Document" section of your HAF application.

1. From the "Applications" page, click on the program link for your HAF application.

The "My Documents" section will display the documents that you submitted as part of your HAF application. It will also display the templates that you are required to complete as part of the reporting requirements.

> **Note: Each reporting period will have specific requirements on which template to complete.**

Project Details

Program you're applying for
Housing Accelerator Fund

Project Name
Test HAF Application - City of Canada

Project Type
New Construction

CMHC Client Solutions Representative

Additional Project Details

Question	Status
Application Stream	Answered
Proponent Type	Answered
Municipality Type	Answered
Housing Needs Assessment	Answered

Additional Information

Question	Answer	Details	Eligibility
What is the annual housing supply growth rate?	2. 1.50% to 2.50%		Yes
What is the annual growth rate percentage change?	2. 15.00% to 20.00%		Yes
Is there a current housing needs assessment?	1. Yes, a current report is available		Yes

Initiatives

Initiative Name	Estimated Start Date	Estimated Completion Date	Estimated Number of Units the Initiative will Incent - Within the Program Period	Score	Created On
Implementing an e-permitting system	2024-02-01	2025-07-01	120	14.00	2023-12-08
Zoning Bylaw Updates	2023-10-01	2024-04-30	40	16.00	2023-12-08
Consultation program to support community needs for different housing types	2024-01-01	2024-08-01	8	20.00	2023-12-08
Improve planning approval processes	2024-01-01	2024-12-31	20	20.00	2023-12-08
Secondary Suite Incentive Program	2023-11-01	2024-12-31	130	12.00	2023-12-08
Enable the development of affordable housing on city owned land	2023-11-01	2025-11-01	300	16.00	2023-12-08
Create program to fast track rental and affordable housing	2023-12-01	2024-06-30	400	14.00	2023-12-08

My Document

Integrity Declaration.pdf

Housing Needs Assessment Report.pdf

HAF Application Form.xlsx

Attestation Template.pdf

Capital Projects Template.xlsx

Permit Data Template.xlsx

Use of HAF Funding Template.xlsx

[Withdraw Application]   [Return to My Applications]

2. Click on the "Attestation Template" and "Capital Projects Template" to download on your computer. Complete both templates.

> **Important: Follow the "Instructions" tab in the capital projects template for guidance on how to complete the document.**
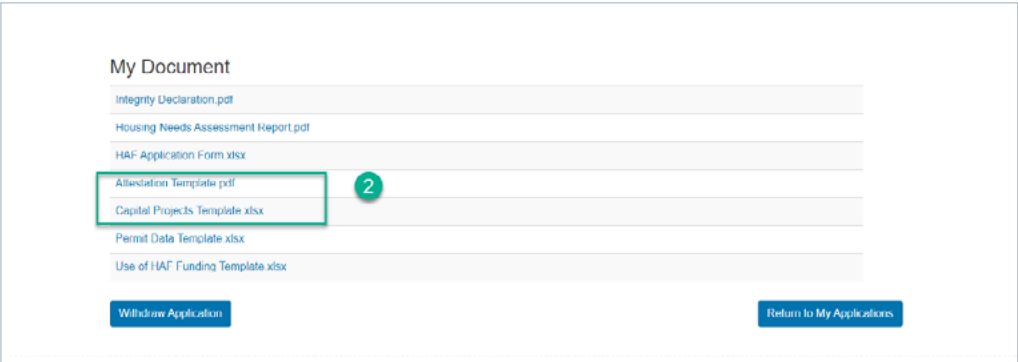

Upload Completed Templates to the Agreement Report

The "My Activities" page will display the agreement reports that are ready for you to complete and submit.
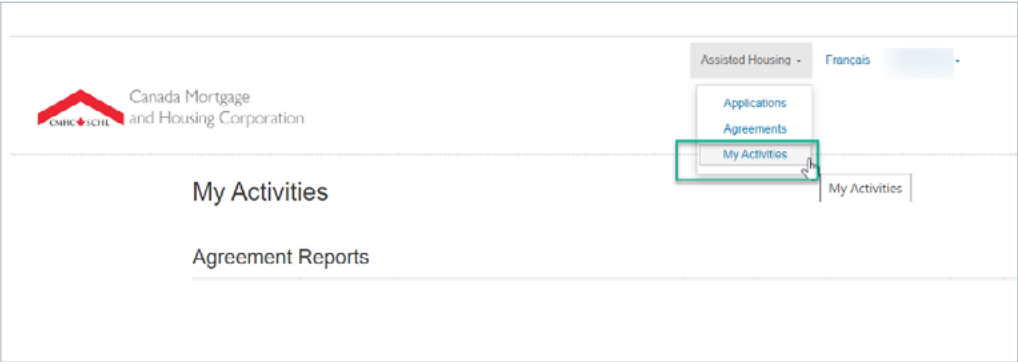
1. From the "My Activities" page, click on the "View" button of the agreement report associated to the HAF application.

> **Note: Proponents may have multiple agreement reports in the "Agreement Reports" grid if they have agreement reports for other CMHC programs.**
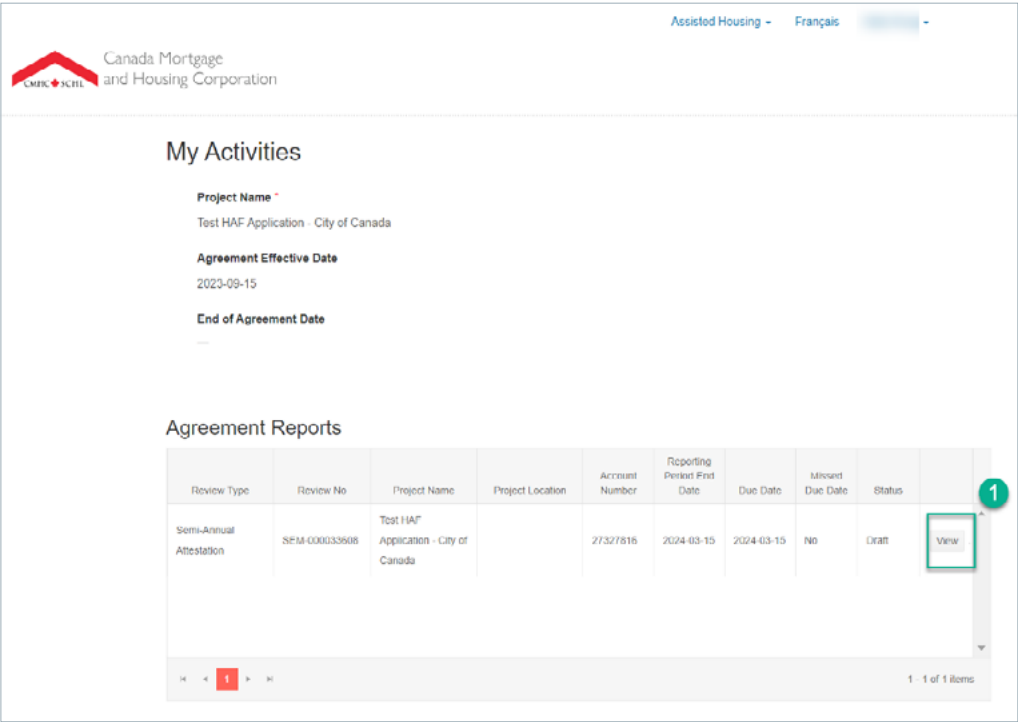
Within the CMHC portal:

All fields marked with an asterisk (*) are required fields. All required fields must be populated with accurate information before you can submit the agreement report.

As you complete your agreement report, the changes are saved automatically. You may leave the CMHC portal and return at a later time; your agreement report will be saved.

Once your agreement report is submitted, it will be date stamped and read-only. If you need to make edits to your agreement report, you will need to contact CMHC to have your agreement report returned to you.

2. To upload the completed templates, click on "Choose Files" to upload to the agreement report.

3. **Only applicable for proponents that have a housing needs assessment and require to add a scheduled review date (at the time the contribution agreement was signed):** Provide a date to the question "When is the next scheduled review date for the Housing Needs Assessment?".

4. Once the completed templates have been uploaded, the files will appear in the "My Documents" section.

5. Click on the checkbox to confirm that the information to be submitted is true to the best of your knowledge and you have the authority to submit the attestation on behalf of your organization.

6. Click on "Submit Attestation."

Note: In order to delete an uploaded document, click on the dropdown arrow and click on the "Delete" button. You can only delete your documents as long as the document was uploaded before the agreement report is submitted to CMHC.
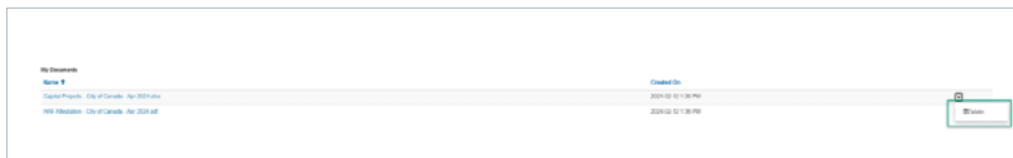
To view and/or print your submitted agreement reports, refer to "View and/or Print your Submitted Agreement Report" in this guide.

Annual Agreement Reports (Second, Third, and Fourth Reporting Period)

In addition to the semi-annual agreement report (i.e. within the first 6 months of the effective agreement date), proponents must complete annual agreement reports for the second, third, and fourth reporting period, which will include:

− A signed attestation letter from the CFO or equivalent

− A completed capital projects report

− A completed Use of HAF Funding report

− A completed Permit data report

− Updates on action plan commitments, and

− Updates on initiatives and associated milestones
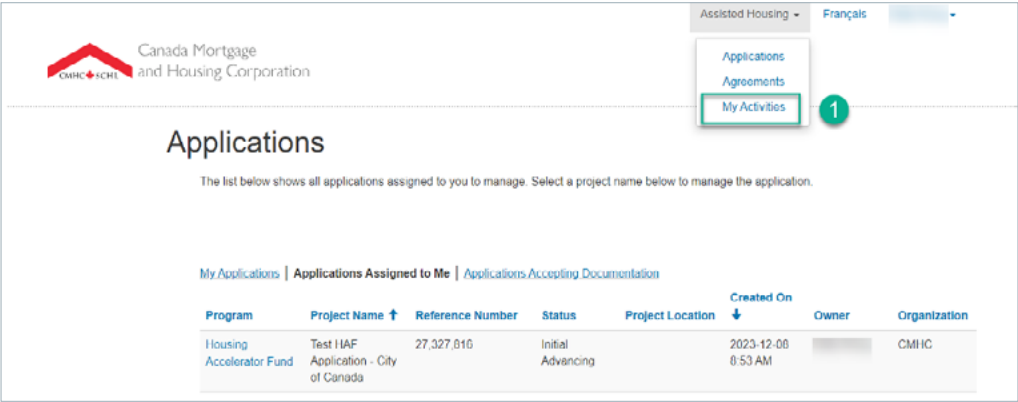
A CMHC representative will contact proponents with a reminder to complete the annual agreement reports through the CMHC portal. The annual agreement reports will be available for proponents to complete based on the effective agreement date, as outlined in the contribution agreement:

− Second Reporting Period: One year after the effective agreement date

− Third Reporting Period: Two years after the effective agreement date

− Fourth Reporting Period: Three years after the effective agreement date

The due date to submit the annual report is based on the effective agreement date as outlined in the contribution agreement.

−   Second Reporting Period: One year plus 30 days after the effective agreement date

−   Third Reporting Period: Two years plus 30 days after the effective agreement date

−   Fourth Reporting Period: Three years plus 30 days after the effective agreement date

1. Login to the CMHC portal. From the "Assisted Housing" dropdown, click on "My Activities".

2. Annual agreement reports that are ready to be completed can be found in the "Agreement Reports" grid in the "My Activities" page. Click on the "View" button of the agreement report for your HAF application.

Step 1: Provide an Update on Action Plan Commitments

1. **How many net new units were permitted in the reporting period?**
   Enter the number of net new residential units that were permitted in the reporting period.

Note: Permitted units refers to units for which building permits for new housing construction were issued during the reporting period for residential buildings. The reference to "net" is to consider any demolitions or conversions that may have taken place during the reporting period (i.e. units that are lost to the housing stock by way of demolitions or conversions from residential to non-residential should be subtracted from the number of permitted residential units to arrive at the net total).

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2. **Of the net new units that were permitted in the reporting period, how many were single detached homes?**
   Enter the number of single detached homes that were permitted in the reporting period from the number of net new units permitted.

3. **Of the net new units that were permitted in the reporting period, how many were multi-unit housing in close proximity to rapid transit?**
   Enter the number of multi-unit housing in close proximity to rapid transit units that were permitted in the reporting period from the number of net new units permitted.

4. **Of the net new units that were permitted in the reporting period, how many were missing middle housing?**
   Enter the number of missing middle housing units that were permitted in the reporting period from the number of net new units permitted.

5. **Of the net new units that were permitted in the reporting period, how many were other multi-unit housing?**
   Enter the number of other multi-unit housing units that were permitted in the reporting period from the number of net new units permitted.

6. **Of the net new units that were permitted in the reporting period, how many were affordable units?**
   Enter the number of affordable units that were permitted in the reporting period from the number of net new units permitted.

7. **Are you on pace to surpass your housing supply growth target?**
   Select "Yes" from the dropdown option only if you are on track to **SURPASS** your housing supply growth target. Select "No" if you are **on track** or **delayed** to meeting your housing supply growth target.

Note: This question is only applicable for the second and third reporting period agreement report.

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8. **Are there any additional initiatives that you would like to implement that will increase your housing supply growth target, should additional funding become available?**
Select "Yes" from the dropdown option if you would like to implement new initiatives that will increase your housing supply growth target. Refer to Step 3: Propose Net New Initiatives to Increase Housing Supply Growth Target (Optional).

> **Note: This question is only applicable for the second and third reporting period agreement report.**

9. **What is the amount of HAF funding spent in the reporting period?**
Enter the amount of HAF funds that were spent in the reporting period. This is based on all advance(s)/payments(s) made during the reporting period.

> **Note: Please ensure that this amount matches your Use of HAF Funding report (Refer to Step 4: Download and Complete Permit Data, Use of HAF Funding, Capital Projects, and Attestation Template). For example, if you spent $2M in the reporting period, the amount of HAF funding spent for each subcategory in the reporting period in the Use of HAF Funding template should sum to $2M.**

10. **What is the total amount of HAF funding spent for all reporting periods, based on all advance(s) to date?**
Indicate the cumulative amount of HAF funding spent to date for all reporting periods, based on all advance(s)/payment(s).

> **Note: Please ensure that this amount matches your Use of HAF Funding report (Refer to Step 4: Download and Complete Permit Data, Use of HAF Funding, Capital Projects, and Attestation Template). For example, if you spent collectively $5M based on all reporting periods, the cumulative amount of HAF funding spent for each subcategory in the Use of HAF funding template should sum to $5M.**

11. **Have you provided an update to all initiatives and milestones within this attestation?**
Return to this question once you have completed Step 2: Provide an Update on your Initiatives. Select "Yes" from the dropdown option once you have provided an update to all of the initiatives and associated milestones under the "Approved Initiatives and Milestones" table in the agreement report.

12. When is the next scheduled review date for the Housing Needs Assessment?
   Indicate when the next scheduled review date will be for the Housing Needs Assessment.
   This question is only applicable for proponents that have a housing needs assessment,
   but require to add a reoccurring scheduled review date (at the time the contribution
   agreement was signed). This question is only applicable during the first reporting period
   and second reporting period.

Step 2: Provide Update on Initiatives

Your approved initiatives will appear in the "Approved Initiatives and Milestones" table.

1. Click on the dropdown arrow next to the initiative and click on "Edit". An "Edit Initiative" popup window will appear.

> **Note: If the pop-up window does not appear when you click on the question, ensure that pop-ups are not blocked by your internet browser.**

2. In the "**Status**" field, enter a status for your initiative. Please do not use the status "Not Selected", which is for internal CMHC use only.
3. In the "**% of initiative complete**" field, enter the approximate percentage of completion of the initiative.
4. In the "**Actual Start Date**" field, enter the start date of the initiative. If the initiative has not started, leave the field blank.
5. In the "**Actual Completion Date**" field, enter the completion date of the initiative. If the initiative has not been completed, leave the field blank.

6. All of the milestones associated with the initiative will appear in the "Milestones" table. Click on the dropdown arrow of the milestone and click on "Edit". An "Edit Milestone" pop-up window will appear.

7. In the "**Status**" field, enter a status for your milestone. Please do not use the status "Not Selected", which is for internal CMHC use only.

8. In the "**Actual Start Date**" field, indicate the start date of the milestone. If the milestone has not started, leave the field blank.

9. In the "**Actual Completion Date**" field, indicate the completion date of the milestone. If the milestone has not been completed, leave the field blank.

10. In the "**Comments**" field, provide an update on the progress of the milestone. If the milestone is delayed, provide a rationale for the delay and the next steps and timelines to get the milestone back on track.
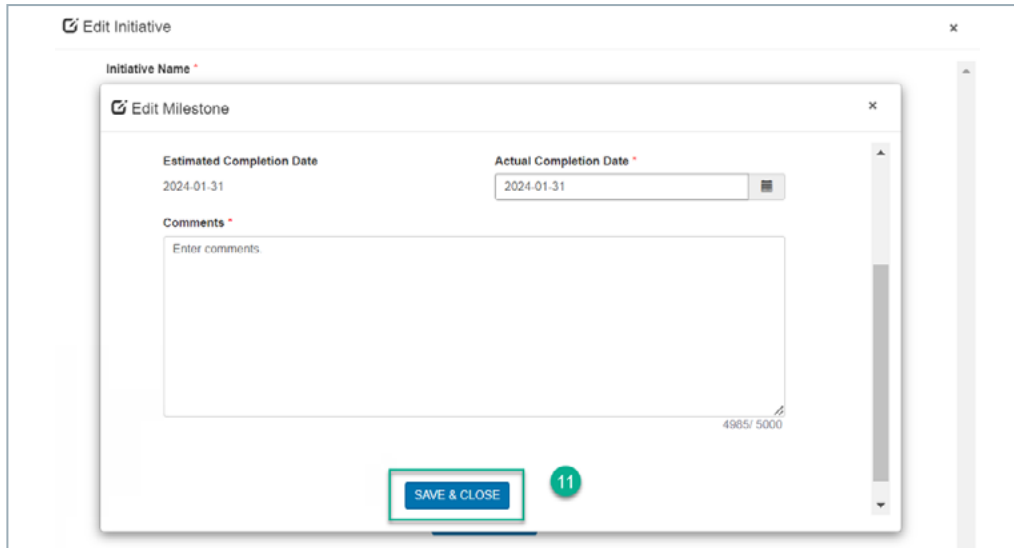
11. After you have entered in a value in the "Status", "Actual Start Date" (if applicable), "Actual Completion Date" (if applicable), and "Comments" field, click on "SAVE & CLOSE".
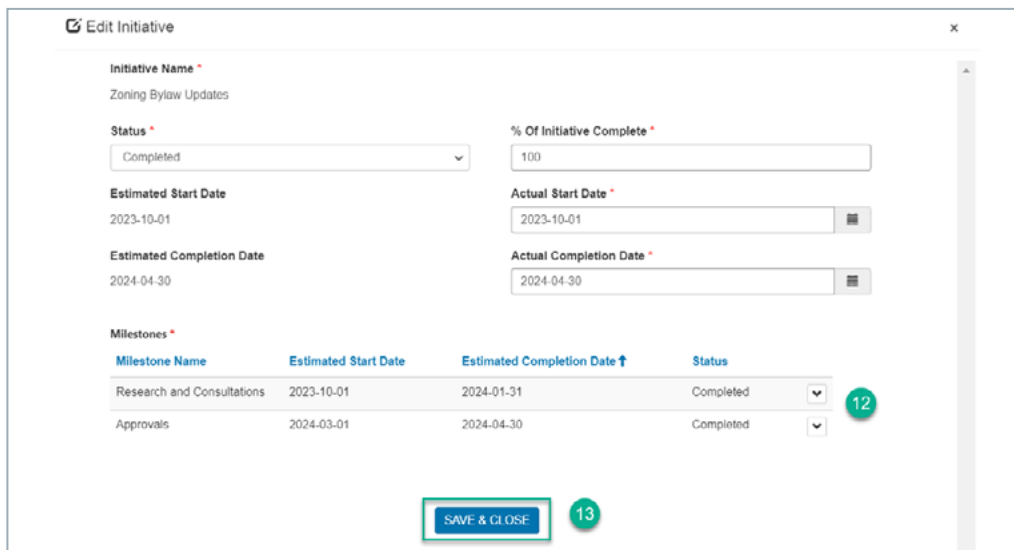
12. You will be brought back to the "Edit Initiative" pop-up window.

13. Once you have provided an update to all the milestones associated to the initiative, click on "SAVE & CLOSE."

14. Follow the same steps 1-13 in this section to provide an update to the remaining initiatives and associated milestones.

Note: Proponents who did not have a Housing Needs Assessment at the time of signing the contribution agreement will have the initiative "Housing Needs Assessment" in the "Approved Initiatives and Milestones table". If this is applicable to your agreement report, follow the same steps 1-13 in this section to provide an update to the initiative and associated milestone for the completion of the Housing Needs Assessment.

Step 3: Propose Net New Initiatives to Increase Housing Supply Growth Target (Optional)

Proponents have the option to propose net new initiatives to add to their action plan to increase their housing supply growth target to receive additional HAF funding. Proposing new initiatives does not guarantee approval of the new initiative and additional HAF funding. CMHC will review any newly proposed initiatives during its assessment and will communicate the outcome of its assessment.

Adding new initiatives to your action plan is **optional**. Proponents are not required to implement new initiatives beyond what they have already been approved for in their contribution agreement.

If you wish to add new initiatives to your action plan, follow the steps in Part A: Add New Initiative and Part B: Add Initiative Details. Otherwise, skip this step in the portal and proceed to Step 4: Download and Complete Permit Data, Use of HAF Funding, Capital Projects and Attestation Template.

> **Note: The ability to add net new initiatives is only available for the second and third reporting period agreement report.**

Part A: Add New Initiative

In the "New Initiatives and Milestones" table, click on the "ADD NEW INITIATIVE" button. A pop-up window will appear, allowing you to enter the details of your initiative.

1. **Initiative Name:** Enter a name for your initiative.
2. **Initiative Type:** Click on the magnifying glass to display the list of initiative types to select from. Click on the arrow to navigate to the next page to display more initiative types. If your proposed initiative does not fall within the recommend initiative types, select "Other".
3. **If "Other" please indicate:** Only if "Other" was selected as the initiative type, provide a short description of your proposed initiative. Otherwise, leave this field blank.

4. **Describe your initiative, including its goals and objectives:** Provide an outline of your specific initiative and expected outcome(s). Highlight the key aspects in which your proposed initiative meets the objectives of the HAF program. Recommend 3 - 6 sentences.

   Suggested questions to help develop the description outline:

   - Will this initiative increase housing supply and if so, what is the type of housing incented?
   - What policies need to be changed?
   - What actions will be taken to foster its success?
   - What will the estimated costs be used for? Will you need funding to hire expertise, improve capacity, and/or develop resources to implement this initiative?

5. **Estimated Start Date:** Enter the (estimated) date that the initiative will start. The initiative must have started after your effective agreement date.

6. **Estimated Completion Date:** Enter the (estimated) date that the initiative will be completed and implemented.

7. **Estimated number of units the initiative will incent within 10 years:** Enter the expected number of net new residential permits that the initiative will incent within 10 years.

8. **Estimated Cost:** Provide the estimated cost of implementing the initiative. Include all costs associated with the initiative, which can include staffing costs where applicable.

9. **Estimated number of units the initiative will incent within the program period:** Enter the expected number of net new residential permits that the initiative will incent within three years of the effective date of your agreement.

10. **Other Expected Results:** Use this section to elaborate and quantify on the projected number of net new residential permitted units that this initiative will incent. Be specific and detailed when explaining how the number was determined. Outline any assumptions or calculations that were used.

    You need to include the specific unit type that will result from this initiative and how many of each unit type is Affordable, in the following format, added as a template to the field:

    - X Single Detached Homes (X Affordable)
    - X Multi-Unit Housing in Close Proximity to Rapid Transit (X Affordable)
    - X Missing Middle Housing (X Affordable)
    - X Other Multi-Unit Housing (X Affordable)
    - Replace "X" with applicable values; if there are no permitted units attached, replace "X" with 0

11. Once all the required fields are populated, click on the "SAVE & CONTINUE" button.

Create Initiative

Complete all required fields and select the 'SAVE & CONTINUE' button to proceed to the next step.

1 Initiative Name *

2 Initiative Type *

3 If "other", please indicate

4 Describe your initiative, including goals and objectives *

3500/ 3500

5 Estimated Start Date *
YYYY-MM-DD

6 Estimated Completion Date *
YYYY-MM-DD

7 Estimated number of units the initiative will incent within 10 years *

8 Estimated Cost *

9 Estimated number of units the initiative will incent within the program period *

10 Other Expected Results *

1000/ 1000

CANCEL   SAVE & CONTINUE   **11**

Part B: Add Initiative Details

The "Add Initiative Details" pop-up window will open after clicking on the "SAVE & CONTINUE" button from Step 11 in Part A: Add New Initiative. There are 3 mandatory sections to complete: Priority Objectives, Initiative Assessment Questions and Milestones. These sections will be used to assess and score the initiative.

Priority Objectives:

1. Click on the "ADD PRIORITIY OBJECTIVES" button.

2. A pop-up window will open. Select the priority objective(s) applicable to this initiative. You must select a minimum of 1 priority objective (maximum of 4).

3. Once selected, click on the "ADD" button, which will add your selection to the "Selected records" section at the bottom of the pop-up window.

4. Then, click on the "X" to close the popup window.

Note: To remove a priority objective that was previously selected, click on the dropdown arrow next to the priority objective and click on the "Remove" button.

5. In the "Explain how the initiative supports the Priority Objective(s) selected" field, provide an explanation of how the initiative supports the priority objective(s) of the program. Recommend adding 2 - 4 sentences.

   Suggested questions to help develop how the initiative supports the priority areas outline:

   – How will this initiative reduce barriers to housing supply and development approvals?

   – How will it speed up the development of housing supply?

   – How will it foster the development of complete, affordable and/or climate compatible communities?

Initiative Assessment

In the Initiative Assessment section, you will need to answer 4 evaluation questions about the initiative. These questions will be assessed and scored. To answer the questions, click on the hyperlink to each question to open a separate pop-up window.

1. **Question: How long will it take to complete the initiative?**
   This question measures the **Implementation** time required to complete the initiative (Estimated completion date).

   The options to select from include:

   – Within 1 year – 5 points

   – Within 2 years – 3 points

   – Over 2 years – 1 point

   Please provide an explanation in the "Provide Details" comment box to substantiate your selected value. Then click on the "Save & go to the Next question" button.

2. **Question: How long will it take to start to achieve additional permitted units as a result of the initiative?**

   This question measures the *Timeliness* of the initiative, which is the amount of time that it will take to start seeing results (permitted units) after completing the initiative.

   The options to select from include:

   – Within 1 year – 5 points

   – Within 2 years – 3 points

   – Over 2 years – 1 point

   Please provide an explanation in the "Provide Details" comment box to substantiate your selected value. Then click on the "Save & go to the Next question" button.

Additional Information   ✕

How long will it take to start to achieve additional permitted units as a result of the initiative?

Please select your answer

[⌄]

Provide Details

[   ]

[Save & go to Previous question] [Save & go to Next question] [Save & Close]

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3. **Question: What is the extent to which the initiative will improve housing and community outcomes?**
   This question measures the *Supply Impact* the initiative will have on the HAF units created. Initiatives that have a high impact on the overall growth target (i.e. account for a large increase of the total HAF units) will result in higher scores.

   The options to select from include:
   - High degree of improvement – 5 points
   - Medium degree of improvement – 3 points
   - Low degree of improvement – 1 point

   Please provide an explanation in the "Provide Details" comment box to substantiate your selected value. Then click on the "Save & go to the Next question" button.

Additional Information	✕

   What is the extent to which the initiative will improve housing and community outcomes?

   Please select your answer

   ⌄

   Provide Details

   [Save & go to Previous question] [Save & go to Next question] [Save & Close]

4. **Question: What is the extent to which the initiative increases stability and predictability in the housing system?**

This question measures the housing ***System Impact*** that the initiative will have and the impact on reducing exclusionary zoning. Initiatives with a high degree of improvement will significantly decrease permitting approval timelines, are long lasting by nature, are anticipated to continue to incent units long-term and impact a large portion of associated geographical area or a high number of potential housing projects. Be specific and provide quantifiable measures (i.e. approval times will decrease by 3 months, representing a 25% reduction).

The options to select from include:

- High degree of improvement – 5 points

- Medium degree of improvement – 3 points

- Low degree of improvement – 1 point

Please provide an explanation in the "Provide Details" comment box to substantiate your selected value. Then click on the "Save & Close" button.

After you have answered the 4 initiative assessment questions, the answer you selected will be displayed in the "Answer" column and the scores associated to the answer selected will be displayed in the "Points" column. The maximum score per initiative is 20 points.

Milestones

In this section, you will enter the associated milestones for the initiative. Milestones should be meaningful steps towards the completion of the initiative. Milestones will be used to track the progress of the initiatives during the annual reporting process.

> **Note: You must include a minimum of 1 milestone per initiative.**

1. Click on the "ADD NEW MILESTONE" button, which will open a new popup window.

2. **Milestone Name:** Add a name for the milestone.

3. **Estimated Start Date:** Enter the (estimated) date that the milestone will start.

4. **Estimated Completion Date:** Enter the (estimated) date that the milestone will be completed.

5. **Description of Milestone:** Describe the milestone and the expected outcome(s). Recommend 3 - 5 sentences.

6. After all the required fields are populated, click on the "DONE WITH ADDING MILESTONE" button. Continue with the same steps to add all the applicable milestone(s) to this initiative.

7. If you need to edit the milestone, click on the dropdown arrow of the milestone row and click on "Edit". A popup form will open allowing you to make the necessary edits. To delete a milestone, click on the dropdown arrow of the milestone row and click on "Delete".

8. When all the milestones have been entered, click on the "SAVE & CLOSE" button at the bottom of the form to return to the agreement report page.

9. The initiative(s) that you created will be visible in the "New Initiatives and Milestones" table. Follow the same steps to add more initiatives to your agreement report (if applicable).

10. To edit an initiative, click on the dropdown arrow for the initiative, and click on the "Edit" button. A popup window will open allowing you to make the necessary edits. To delete an initiative, click on the dropdown arrow for the initiative, and click on the "Delete" button.

Step 4: Download and Complete Permit Data, Use of HAF Funding, Capital Projects and Attestation Template

The following templates can be downloaded from the "My Documents" section in your HAF application.

1. Permit data (required for the second, third, and fourth reporting period)
2. Use of HAF funding (required for the second, third, fourth, and fifth reporting period)
3. Capital Projects (required for the first, second, third, and fourth reporting period)*
4. HAF Attestation (required for the first, second, third, fourth, and fifth reporting period)

> **Important: Please refer to the "Instructions" tab in the permit data, use of HAF funding, and capital projects template for guidance on how to complete each template.**

*Note:** The requirement to submit information on the use of HAF funding towards capital projects is every 6 months. You will be able to submit your completed capital projects report in CMHC's portal during the annual agreement report process (i.e. first, second, third, fourth, and fifth reporting period). However, you will also need to submit a completed capital projects report directly to a CMHC representative 6 months following each annual agreement report.

Step 5: Upload Documents & Submit Agreement Report

After you have completed the templates listed in Step 4: Download and Complete Permit Data, Use of HAF Funding, Capital Projects and Attestation Template, upload the completed documents into the agreement report.

> Important: Please ensure that the file name will identify the content of the document. For example, Permit Data Report – Second Reporting Period.

1. To attach files to your agreement report, click on "Choose Files" and select the attachment from your computer. Once the file is selected, click "Upload Files" to attach them to the agreement report.

2. Once successful, your files will be listed under the "My Documents" section. Navigate to the next page to see all the documents.

> Note: Documents may not appear immediately after uploading. You may need to refresh the page.

3. To delete a document, click on the dropdown arrow for the document and click "Delete".

> **Note: You can delete documents that were uploaded in error. However, documents cannot be deleted after you have submitted the agreement report. If there are errors in previously submitted documents, CMHC will return the agreement report back to you to edit. As each file name must be unique, you will need to upload the correct report using a different name than the file that was originally uploaded. For example, if the file that was originally uploaded was named "Permit Data Report – Second Reporting Period", you will need to name the new file "Permit Data Report – Second Reporting Period – V2" before uploading the document.**

4. In the agreement report, go back to the question "Have you provided an update to all the initiatives and milestones within this attestation?". After you double checked that you have provided a status to all the initiatives and milestones, select "Yes" from the dropdown menu.

5. Click on the checkbox to confirm that the information to be submitted is true to the best of your knowledge and you have the authority to submit the attestation on behalf of your organization.

6. Click on "Submit Attestation."

Important Notes for the Third and Fourth Reporting Period Agreement Report Only

1. If CMHC has verified that your **initiative** is completed during its review of the agreement report, the initiative's "Status", "% of Initiative Complete, "Actual Start Date", and "Actual Completion Date" will be auto populated and read-only for subsequent years' agreements reports.

    For example, if the initiative "Zoning Bylaw Updates" was verified by CMHC to be completed in the second reporting period agreement report, the "Status", "% of Initiative Complete, "Actual Start Date", and "Actual Completion Date" will be read only for the Third Reporting Period and Fourth Reporting Period agreement report. You do not have to provide a status update for completed initiatives.

2. If CMHC has verified that your **milestone** is completed during its review of the agreement report, the milestone's "Status", "Actual Start Date", "Actual Completion Date", and "Comments" field will be auto populated and read-only for subsequent agreement reports. For example, if the milestone "Research and Consultations" was verified by CMHC to be completed in the second reporting period agreement report, the "Status", "Actual Start Date", "Actual Completion Date", and "Comments" field will be auto populated and read-only for the Third Reporting Period and Fourth Reporting Period agreement report. You do not have to provide a status update for completed milestones.

3. If the **initiative** is **not completed**, you will need to provide a new update in each agreement report until it is completed. This means that the values that you entered in the initiative's "Status", "% of Initiative Complete", and "Actual Completion Date" for a reporting period (second reporting period for example) does not automatically populate to subsequent years' reporting period (third and fourth reporting period for example). You will need to provide a new status for the current reporting period agreement report.

Note: If you entered a value in the "Actual Start Date" for an initiative, it will be auto populated and made read only for subsequent years' agreement reports.
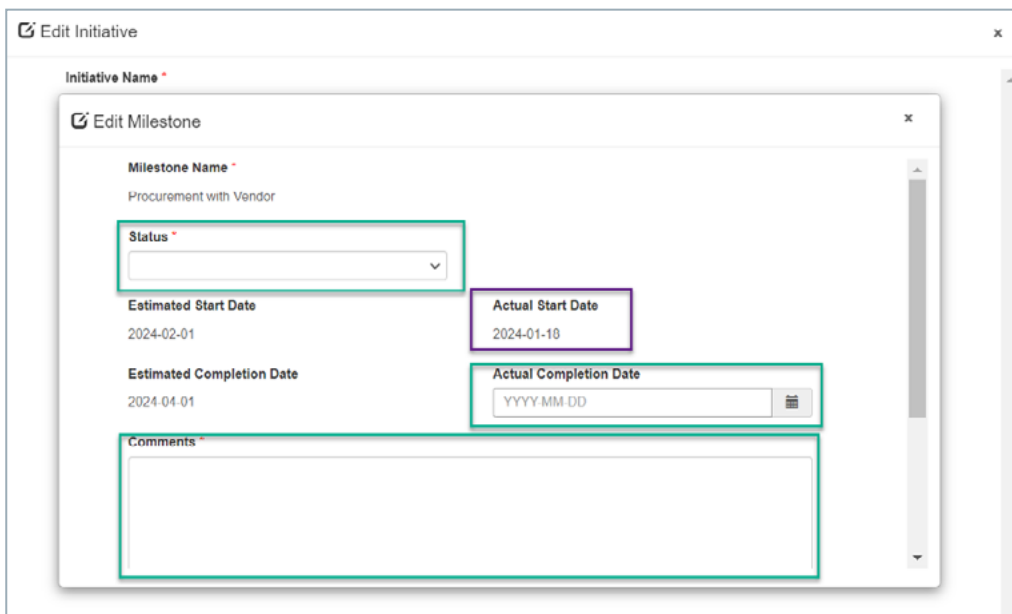
4. If the **milestone** is **not completed**, you will need to provide a new update for each agreement report until it is completed. This means that the values you entered in the fields "Status", "Actual Completion Date", and "Comments" for a reporting period (second reporting period for example) does not automatically populate to subsequent years' reporting period (third and fourth reporting period for example). You will need to provide a new status for the current reporting period agreement report.

Note: If you entered a value in the "Actual Start Date" for a milestone, it will be auto populated and made read only for subsequent agreement reports.

Annual Agreement Report (Fifth Reporting Period)

As part of the HAF reporting requirements, proponents must submit to CMHC an agreement report for the fifth reporting period, which will include:

– A signed attestation letter from the CFO or equivalent

– A completed Use of HAF Funding report, and

– Answers to how much HAF funding was spent in the reporting period and cumulatively for all reporting periods

The fifth reporting period annual report will be available for proponents to complete 4 years after the effective agreement date. The due date to submit the annual report for the fifth reporting period is 4 years plus 90 days after the effective agreement date, as outlined in the contribution agreement.

In the "My Activities" page, click on the "View" button of the agreement report for HAF.

1. **What is the amount of HAF funding spent in the reporting period?**
   Indicate the amount of HAF funds that were spent in the reporting period.

   Note: Please ensure that this amount matches your Use of HAF Funding report (Refer to Step 4: Download and Complete Permit Data, Use of HAF Funding, Capital Projects, and Attestation Template). For example, if you spent $2M in the reporting period, the amount of HAF funding spent for each subcategory in the reporting period in the Use of HAF Funding template should sum to $2M.

2. **What is the total amount of HAF funding spent for all reporting periods, based on all advance(s) to date?**
   Indicate the cumulative amount of HAF funding spent to date.

> **Note: Please ensure that this amount matches your Use of HAF Funding report (Refer to Step 4: Download and Complete Permit Data, Use of HAF Funding, Capital Projects, and Attestation Template). For example, if you spent collectively $5M based on all reporting periods, the cumulative amount of HAF funding spent for each subcategory in the Use of HAF funding template should sum to $5M.**

3. Download and complete the attestation template and use of HAF funding template in the "My Documents" section in your HAF application.

4. Upload the completed attestation and use of HAF funding document by clicking on "Choose File". Then click on "Upload Files". The uploaded files will appear in the "My Documents" section.

5. Check the box to confirm that the information to be submitted is true to the best of your knowledge and you are authorized to submit on behalf of your organization.

6. Click on the "Submit Attestation."

View and/or Print your Submitted Agreement Report

1. From the dropdown arrow next to "Assisted Housing", click on "Agreements".

2. From the "Agreements" page, click on the HAF program hyperlink of the application that you would like to view.

3. Click on "View Agreement Reports", which will bring you to the Agreement Reports Summary page.

4. Click on the "View" button next to the agreement report you would like to view.

5. You are able to view the submitted agreement report. To print the agreement report summary page, print the page from the browser.

> **5.1 Note: Printing the page from the browser does not print the answers to the questions under the Agreement Report. If you would like to print the answers, please take a screenshot to print.**

6. Click on the dropdown arrow next to each initiative and click on "View" to view the details of the initiative. A new browser window will open.

7. To print the initiative page, print the page from the browser. On this page, you will find details of the initiative, including the updates that you provided in the agreement report.

Note: The initiative details are only present in the Second, Third, and Fourth reporting period agreement reports.