

Wisconsin 2027-28 Qualified Allocation Plan

Appendix H: Electronic Application Submission and Communication Instructions

Revised: June 22, 2026

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.
- All Housing Tax Credit submissions must be uploaded to the Procorem Workcenter. WHEDA will not accept documents submitted by email. Failure to follow this process can result in late fees incurred, credits revoked due to failure to meet program deadlines, and/or negative points imposed against the development team for future HTC applications.
- 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.

Access to the Procorem WorkCenters is restricted to individuals who are part of the Developer, Co-Developer(s), or Development Consultants with the project and who are named on the signed Procorem Workcenter Request Form.

Procorem Tasks

- WHEDA has created and assigned tasks to help track key steps through each application stage of your project
 - **Step 1: Navigate to Your Tasks**
 - Log into your WorkCenter.
 - Select “Tasks” from the left-hand navigation menu.
 - Review all assigned Tasks under the associated application Task Group.
 - **Step 2: Complete Each Assigned Task**
 - Review the Task description carefully.
 - Upload all required documentation (if applicable).



- Confirm all required materials are complete and accurate.
- Select “Mark as Finished” once the Task has been completed.
- Marking a Task as “**Finished**” notifies WHEDA that the required step has been completed and is ready for review.
- **Step 3: WHEDA Review & Status Updates**
 - WHEDA will review submitted materials.
 - Upon verification, WHEDA will mark applicable Tasks as complete.
 - All WorkCenter collaborators will receive automated notification when a Task status changes.

Application File Organization and Naming Conventions

- Documents should be ordered and named to correspond with the numbers and document titles in the corresponding checklists. 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

- WHEDA will use “Posts” periodically to communicate reminders about deadlines or other project information.

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.