RAD Resource Desk User Guide for PHAs/Owners: Submitting Post-Closing Requests

This guide is intended to inform PHAs and Owners on how to use the RAD Resource Desk to submit a post-closing request for review by HUD's Office of Recapitalization. Please see the RAD Post Conversion Approval Processing Guide for further information on what types of post-closing requests are reviewed by the Office of Recapitalization (versus other offices within HUD) and detailed submission requirements. This guide is divided into the following sections:

- Part I: Navigating to the Post-Closing Processing Page
- Part II: Submitting A "Standard" Post-Closing Request
- Part III: Submitting Transfer of Assistance Restrictive Covenant Release (TOA RCR) Post-Closing Requests
- Part IV: Viewing/Accessing Submitted Requests

Part I: Navigating to the Post-Closing Processing Page

Follow the below steps to submit a new post-closing request.

Step 1: Login to www.radresource.net. Email resourcedesk@radresource.net if you need login assistance.

Step 2: Navigate to the "My Closed Properties" card on your homepage.

Step 3: Click on the property name. In this example, the user should click on "SCATTERED SITES."

MY CLOSED PROPERTIES

PHA	Property	Units Converted	Date Closed	Final Closing Docket Due	Completion Certification Due
Housing Authority of the County of San Mateo (CA014)	SCATTERED SITES	30	11/29/2017	12/21/2017*	Not Applicable

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Step 4: Navigate to the Post-Closing Processing (PHA) page by selecting it from the "Transaction Pages" category at the top of the page for the closed property.
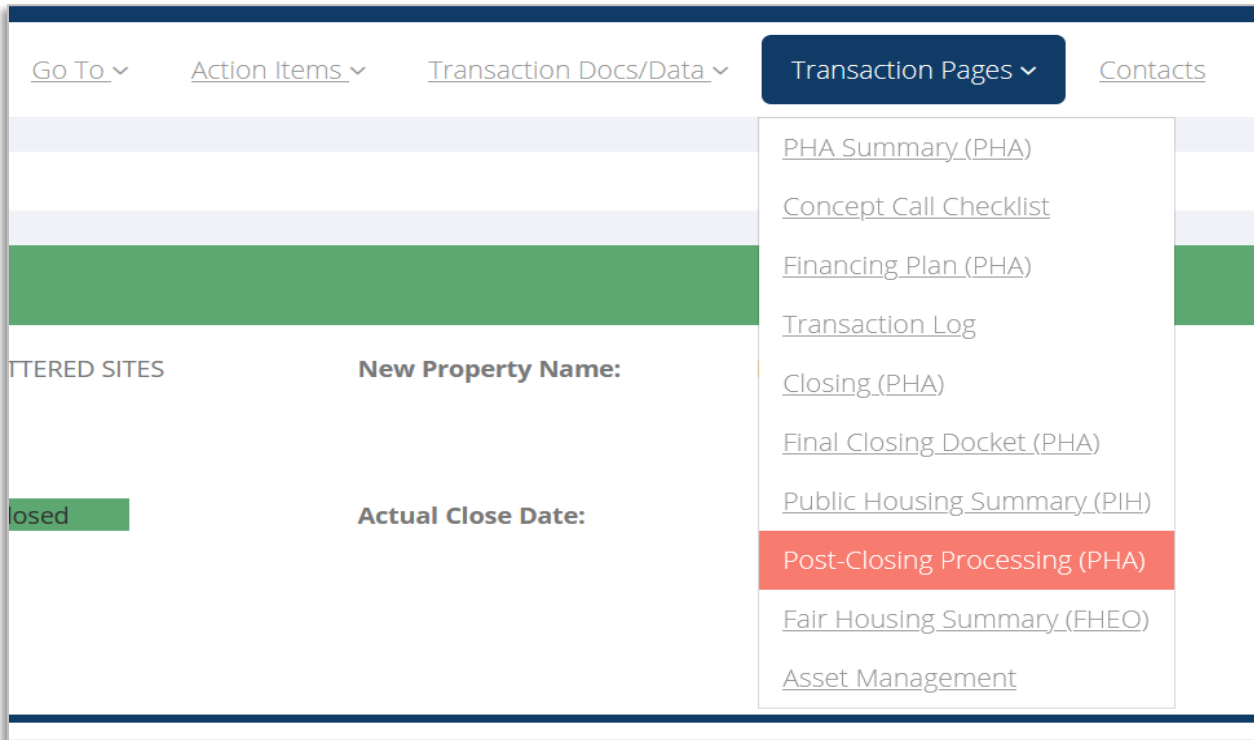
If there are no post-closing requests for the property, the Post Closing Requests section of the card will look like this:
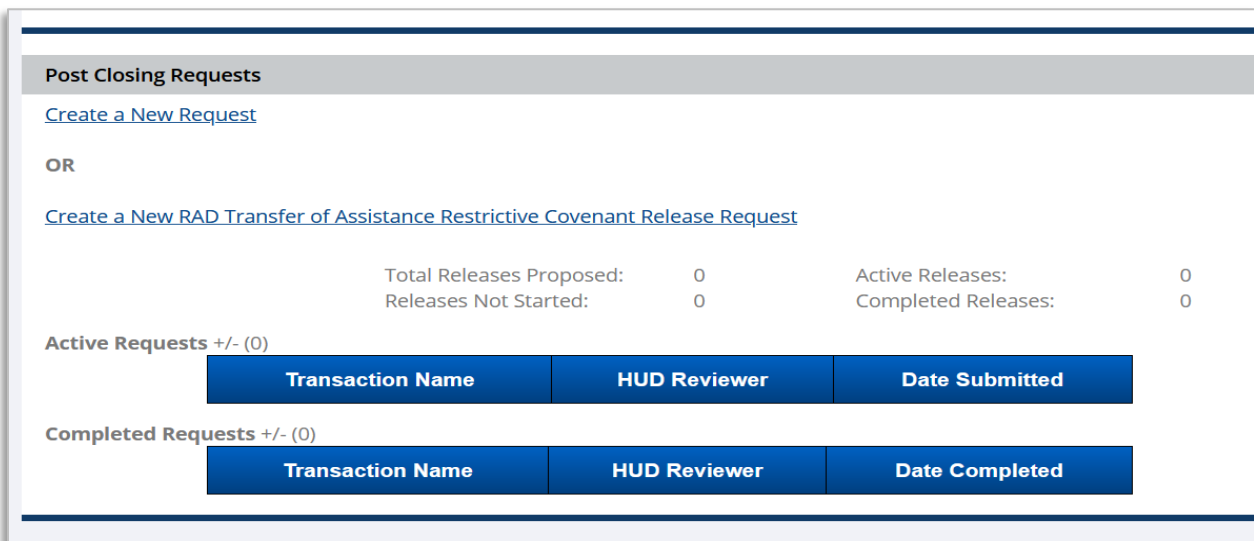
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If there are existing post-closing requests for the property, the Post Closing Requests section might look something like this, depending on how many requests there are and whether they are active or completed:

Post Closing Requests

Create a New Request

OR

Select Address to Submit Subsequent RAD TOA Restrictive Covenant Release Request ❓   [18 Maple Street ⌄]   **Create a New Entry**

| Total Releases Proposed: | 10 | Active Releases: | 2 |
| Releases Not Started: | 8 | Completed Releases: | 0 |

Active Requests +/- (2)

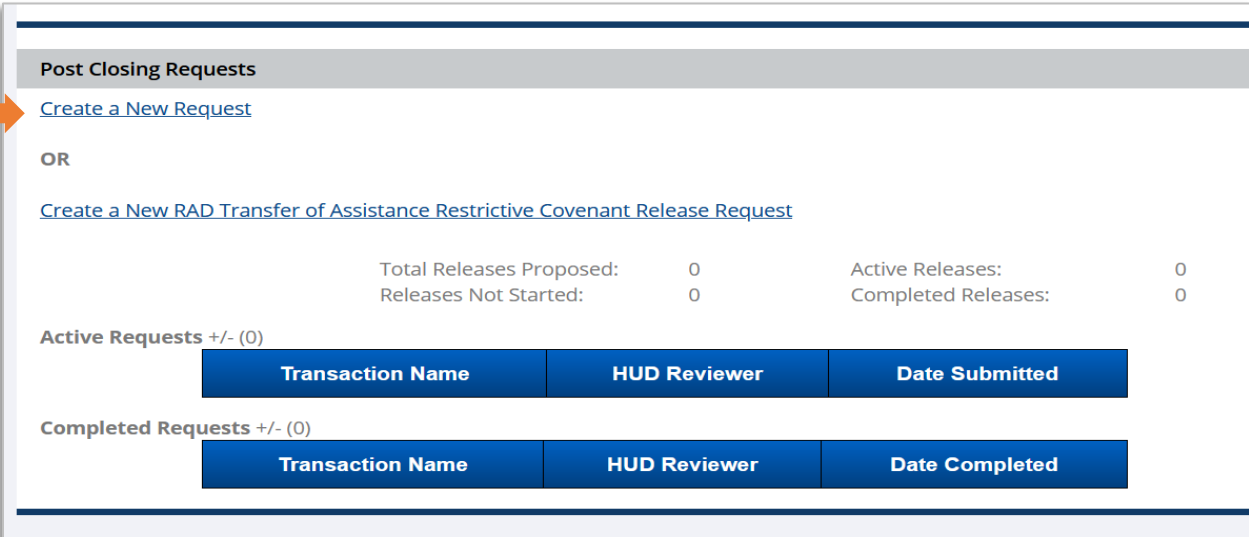| Transaction Name	HUD Reviewer	Date Submitted
RAD TOA Rest Conv Release - SCATTERED SITES - 1 Main Street		08/11/2021
RAD TOA Rest Conv Release - SCATTERED SITES - 12 Cedar Avenue		

Completed Requests +/- (1)

Transaction Name	HUD Reviewer	Date Completed
Example Property Sale Request	Mona Sykes	08/23/2021

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Part II: Submitting A "Standard" Post-Closing Request

As seen in the below screenshot of the Post Closing Processing page, there are two types of post-closing requests: "Create a New Request" or "Create a New RAD Transfer of Assistance Restrictive Covenant Release Request." Unless you a specifically requesting a release of a recorded RAD Transfer of Assistance Restrictive Covenant, you should make your submission by clicking on "Create a New Request." This guide refers to these types of requests as "standard" requests. If you are request a release of a recorded RAD Transfer of Assistance Restrictive Covenant, go to Part III of this guide.

Step 1: Click on Create a New Request.

Step 2: Name your request and select the request type. On the next screen, you will see two cards. The first card has a text box where a descriptive name can be entered for the request, as well as a series of checkboxes listing types of post-closing requests. Enter a name for the request and select the category or categories that the request falls under. Refer to the RAD Post Conversion Approval Processing Guide for more information about each category shown. Multiple categories can be selected for one request, but if the requests can be addressed independently of one another, multiple post-closing requests should be submitted so that they can be processed separately. There is an "Other" category with text boxes for requests that do not match any of the listed categories.

Step 3: Upload a narrative description of your request and supporting documentation. Scroll down the page to view the second card which is called "Upload Documents" and is where any documents related to the post-closing request should be uploaded. Refer to the RAD Post Conversion Approval Processing Guide for a detailed list of required submission items based on the type of request. A narrative overview of the post-closing request must be uploaded to the first part of the card, and other documents should be labelled and uploaded to the second part of the card. Any comments related to the documents being uploaded can also be input in the Comments textboxes. Click Add File to upload the chosen documents to the card or Save Comments to save text entered in the comment boxes.

Step 4: If you are ready to submit your request to HUD, go to Step 5. If you have uploaded documents but are not finished and/or ready to submit your request to HUD, click "Save & Return Later" to save everything on the request and be able to continue working on it at a later date. To return to it at a later date, navigate to the Post-Closing Process Page and select it as shown below. Note that the "Date Submitted" field is empty.
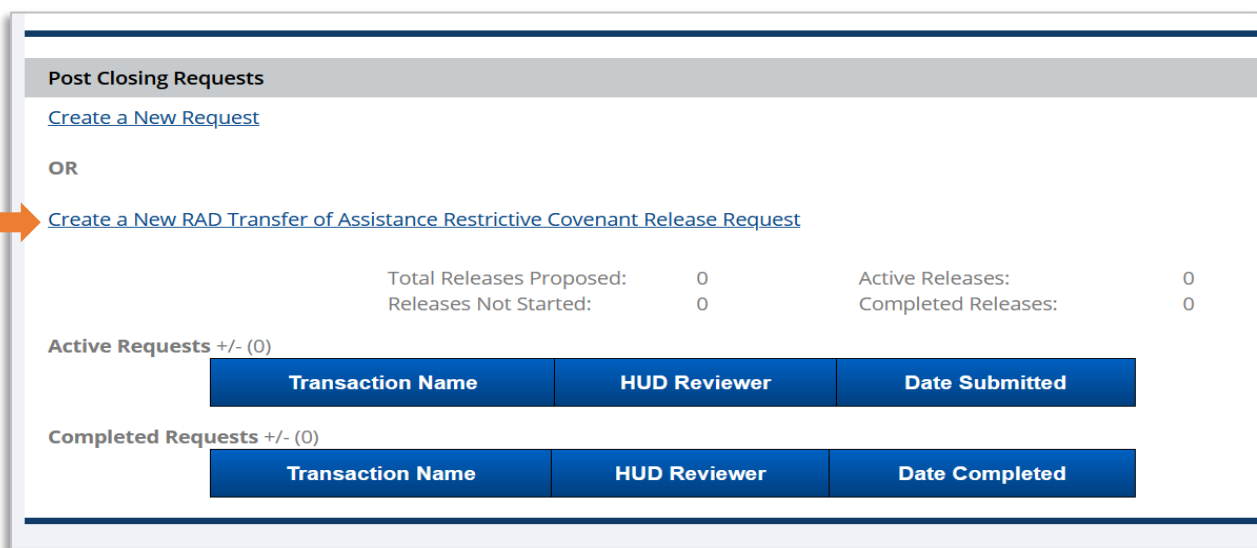

Step 5: Once the request is ready for submission to HUD, click the red "Submit to HUD" button at the bottom of the screen.

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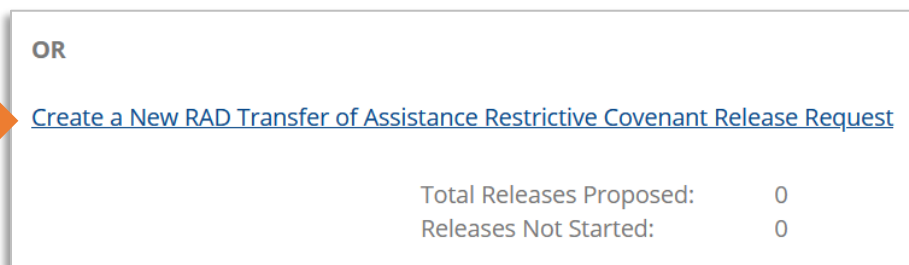
Part III: Submitting Transfer of Assistance Restrictive Covenant Release (TOA RCR) Post-Closing Requests

This section of the guide provides information on how to submit a request for a release (or multiple releases) of one or more RAD Transfer of Assistance Restrictive Covenants from a project that converted under RAD. As noted below, there are two request buttons on the Post-Closing Processing page. This section addresses the second option – "Create a New RAD Transfer of Assistance Restrictive Covenant Release Request." For "standard" requests ("Create a New Request", go to Part II of this guide.

Step 1: If there is only one release for the property, or if you are submitting the first of several TOA RCR requests, click "Create a New RAD Transfer of Assistance Restrictive Covenant Release Request" on the main Post-Closing Processing page for the property.

Step 2: Input basic request information. On the next screen, you will see two cards. The first card has two text boxes: "Input Street Address of Initial Parcel" and "Total No. of Releases Expected for this Transaction."

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The address entered should be the address of the parcel whose TOA Restrictive Covenant is being released, or being released first.

If there are no other parcels whose TOA Restrictive Covenants will be released separately, enter "1" as the Total No. of Releases Expected for this Transaction. Otherwise, enter the total number of parcels you will be requesting releases for in the future. An example of a situation requiring more than one TOA RCR request is a RAD conversion where multiple scattered sites (i.e. townhomes) were transferred to a new construction building via RAD and the PHA will be selling off the townhomes individually over time which may result in 50+ individual sales/release requests. In this case the Restrictive Covenants for each of the scattered site parcels would be released separately. If there will be more than one parcel that will require a TOA RCR request, once the first TOA RCR request is submitted, the PHA should email the email the HUD Reviewer (once assigned) a list of the addresses for the remaining parcels.

Step 3: Upload documents. Scroll down the page to view the second card that is for uploading documents. The Document Upload card is divided into two sections. When submitting an initial TOA RCR request for a RAD conversion, both sections will be empty. Refer to the RAD Post Conversion Approval Processing Guide for a detailed list of required submission items.

The first section is labeled "Documents that pertain to all proposed releases should be uploaded here." Documents upload here will be carried forward to all future RAD TOA Release Requests for this project as HUD typically encourages owners to provide a single narrative, certification, and evidence of a GDA for the entire batch of requests. There are three labeled document upload categories: Narrative Overview of Request, General Depository Agreement, and an Owner Certification, as well as a place for other documents to be named and uploaded. These documents and comments will automatically be copied to all other TOA RCR requests for

the property so that they do not need to be reuploaded when each parcel's restrictive covenant is being released.

The second section of the Upload Documents card, "Upload Additional Documents That Apply to This Unique Release Here," does not have any specific document categories and allows the user to upload documents that only apply to the specific parcel that this TOA RCR request is for.

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Step 4: If you are ready to submit your request to HUD, go to Step 5. If you have uploaded documents but are not finished and/or ready to submit your request to HUD, click "Save & Return Later" to save everything on the request and be able to continue working on it at a later date.

Step 5: Once the request is ready for submission to HUD, click the red "Submit to HUD" button at the bottom of the screen.

Step 6: Submitting a subsequent TOA RCR request. When the user goes to the Post-Closing Processing page after submitting an initial TOA RCR request, the page looks slightly different. The link reading "Create a New RAD Transfer of Assistance Restrictive Covenant Release Request" is replaced with text that reads "Select Address to Submit Subsequent RAD TOA Restrictive Covenant Release Request." Beside this text is a dropdown menu and a button reading "Create a New Entry." Beneath the dropdown menu and button is a group of numbers tracking how many TOA RCR releases have been proposed for the conversion, as well as how many of those requests are active, completed, or not yet started.

The dropdown menu will initially be blank, but after the PHA provides the assigned HUD Reviewer with the list of addresses for the additional parcels, those addresses will appear in the dropdown menu.

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When it is time to submit an additional TOA RCR request, the user should select the address of the parcel from the dropdown menu and click "Create a New Entry."

The first card will look the same as the first card on the initial TOA RCR request, except that the parcel address is already populated with the address selected from the dropdown menu, and the Total No. of Releases Expected for this Transaction is already populated

RAD TOA Rest Cov Release			
Street Address of Parcel:	12 Cedar Avenue	Total No. of Releases Expected for this Transaction:	10
Post Closing Processing			
HUD Reviewer:			
Date Assigned to Reviewer:	Not Yet Assigned		
HUD Counsel Assignment (if applicable):			
HUD Counsel Approval Received (if applicable):			
Date Owner/PHA Contacted:			
Date Owner/PHA Response Due Back:			
Status:			
Branch Chief Approval:			

The Upload Documents card will look the same as it did for the initial request, except that the documents uploaded to the "Documents that pertain to all proposed releases should be uploaded here" section from previous TOA RCR requests for the transaction will already be populated. There is still the option to upload additional documents to this section, which will then retroactively appear in this section for previously created TOA RCR requests.

When creating a subsequent TOA RCR request for a transaction, the "Upload Additional Documents That Apply to This Unique Release Here," section of the Upload Documents card will be blank and documents uploaded to it will only appear on the request for that specific parcel.

The Save and Submit to HUD buttons function the same for the subsequent requests as they do for the standard post-closing requests and the initial TOA RCR requests.

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Part IV: Viewing/Accessing Submitted Requests

Once a request has been submitted to HUD, a submission date appears on the Active Requests table for the request.

Transaction Name	HUD Reviewer	Date Submitted
Example Property Sale Request		08/11/2021

Additional documents and comments can be uploaded by accessing the requests here, and the HUD comments on each document can be seen. Once the request is approved and marked as complete by HUD, it moves to the Completed Requests table on the Post-Closing Processing page.

Completed Requests +/- (1)

Transaction Name	HUD Reviewer	Date Completed
Example Property Sale Request	Mona Sykes	08/23/2021

At this point, the request is still visible, but can no longer be edited.

Active post-closing requests can also be accessed from the Resource Desk homepage, via the Active Post Closing Processing card. You can access the page for the request by selecting the Property Name link for the request whose page you would like to access.

ACTIVE POST CLOSING PROCESSING (2)

Property Name	Transaction Name	Date Submitted	Type
SCATTERED SITES	SCATTERED SITES: Example Property Sale Request	08/11/2021	Property Sale
SCATTERED SITES	RAD TOA Rest Conv Release - SCATTERED SITES - 1 Main Street	08/11/2021	RCR