Quick Links: Portal Access | Project Team Access | Project Checklists | Checklist Submission Process | Files | Chatter |Supported Browsers| Questions

Portal Access

How do I access the Portal?

1. **Your organization must have an account.** If your organization does not already have a Portal account, you must request one. To request an account, please complete one request per organization through our online form. You must include contact information for your organization, as well as a list of each staff person from your organization that needs to access our Portal. If staff from your organization already has a Portal account, you do not need to request a new account.
2. **You must have an individual user login** tied to your organization's account. If your organization has an account but you were not included in the initial account request, submit the Portal Access Change Request Form to request account updates. This form can be used to request changes to existing accounts or to create new user accounts affiliated with an organization.
3. **Log in to the Portal** by going to: mnhousing.force.com/MultifamilyPortal

What if I forget my password?

If you forget your password, you can request a password reset directly on the Portal login page. The system will email a link to reset your password, which will expire within 24 hours. If you don't reset your password within that time, you will need to request another reset.

An employee on one of my projects is no longer at the company. How do I make sure they don't have access to the company's projects?

Complete the Portal Access Change Request Form and submit it to mhfa.app@state.mn.us. **NOTE:** If the account access needs to be immediately suspended, contact Mary Hieb at 651.296.8185 and email the form to mhfa.app@state.mn.us. Type in the subject line, 'Immediate Portal Action.'

Can a processing agent set up a project in the Portal on behalf of a developer or project sponsor?

Yes. When you select 'Apply for Funding,' the first page will prompt you to fill out the developer and sponsor contact information. Additionally, you will add contact information in the Processing Agent section prior to clicking, 'Create Project.' Once the project is created, Minnesota Housing will make sure the project is under the sponsor's organization and the correct views and securities are in place for the project developer, sponsor and processing agent.

Project Team Access

What are Project Teams?

Members of a Project Team are portal account holders assigned to the project. This includes Minnesota Housing staff, other lenders, and team members identified by the project sponsor. There are various levels of access (i.e. read-write, read-only) in the portal but you must have an account to access a project in the portal.

Project sponsors have the ability to designate who from their team needs access to view and work on their project in Portal. Some sponsors choose to submit all forms themselves, while others choose to have their architects, attorneys or supportive housing providers submit documents. Customers can decide who should submit documents on behalf of the selected project. We suggest choosing two to three individuals who will be the core team members submitting documents.

NOTE: There is not a function to export the checklist and distribute it to non-Portal users. If members of your project team are responsible for submitting documentation, we recommend you grant them access to your project in the Portal. Project team members can view all project-related documents uploaded to the Portal. Sponsor and guarantor financials are not collected in the Portal and must be submitted separately via our Multifamily Secure Upload Tool.

How do I know who is assigned to my project team?

View the Project Team section of your project page.

Project Team					
Action	Team Member	Member Role	Account	Email	Phone Number
Edit | Del	Christopher Larson	Attorney 2	Minnesota Housing Finance Agency	chris.larson@state.mn.us	(651) 296-9544
Edit | Del	Karin Base User	HDO	Minnesota Housing Finance Agency	karin.wilbricht@state.mn.us	(651) 296-6529
Edit | Del	Karin ProdDeveloper	Ext Developer	TEST Developer Account	karin.wilbricht@state.mn.us	
Edit | Del	Mary Beth Kehrwald	Loan Processor	Minnesota Housing Finance Agency	mary.beth.kehrwald@state.mn.us	(651) 297-2554

How do I add people to my project team?

To add people to your project team, submit a Project Access Request Form. Complete one Project Access Request Form for each project.

How do I remove people from my project team?

To remove people from your project team, complete the Portal Access Change Request Form.

Project Checklists

I need to submit an Application, Carryover, or 8609 checklist. How do I access my project's checklists?

Within your project navigate to the 'Project Phases' section, and click on the name of the checklist in the 'View Checklist' column.
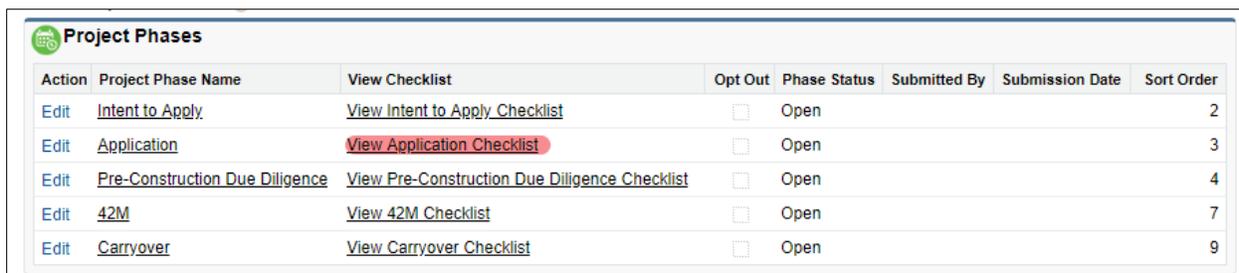
Action	Project Phase Name	View Checklist	Opt Out	Phase Status	Submitted By	Submission Date	Sort Order
Edit	Intent to Apply	View Intent to Apply Checklist	☐	Open			2
Edit	Application	View Application Checklist	☐	Open			3
Edit	Pre-Construction Due Diligence	View Pre-Construction Due Diligence Checklist	☐	Open			4
Edit	42M	View 42M Checklist	☐	Open			7
Edit	Carryover	View Carryover Checklist	☐	Open			9

For the Pre-Application, Intent to Apply, and Application checklists, the first time you open the checklist you will be prompted to select characteristics that will build your customized checklist.

Some checklists including Pre-Construction Due Diligence, Carryover, and 8609, are created by Minnesota Housing staff and made available in the customer's view. Contact the assigned loan processor or underwriter if a checklist you need is not currently available.

One of the characteristics of my project has changed, and I've already made my checklist. How do I change my checklist?

Within the Checklist go into the 'Build Checklist' tab and deselect or select the characteristic that has changed. Click 'Create Checklist' after you have made all desired changes.
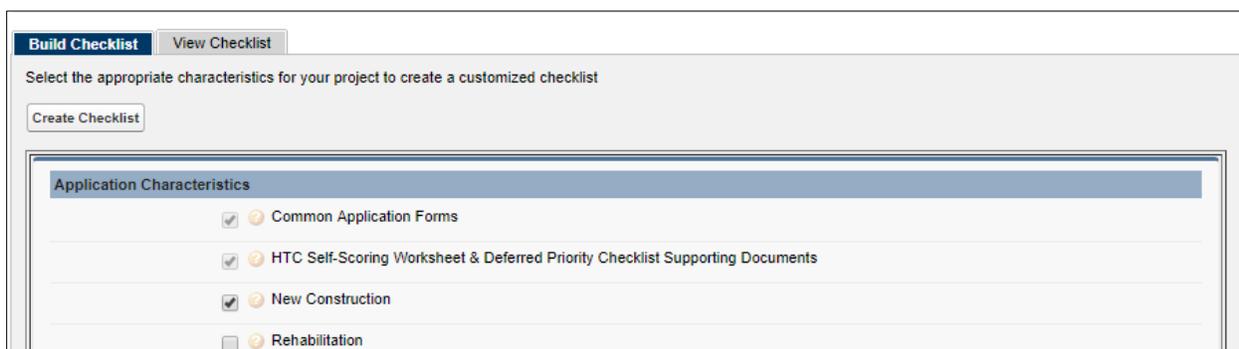
Build Checklist | View Checklist

Select the appropriate characteristics for your project to create a customized checklist

Create Checklist

Application Characteristics

☑ ⓘ Common Application Forms

☑ ⓘ HTC Self-Scoring Worksheet & Deferred Priority Checklist Supporting Documents

☑ ⓘ New Construction

☐ ⓘ Rehabilitation

There will be a pop-up box to notify you that the system is modifying the checklist and prompts you to proceed. The checklist will automatically refresh once you have agreed to the modification.

If I modify the characteristics of my checklist, will the documents I previously uploaded remain in the checklist?

Yes. All documents previously uploaded will be saved.

How do I print my checklist?

Use the "Print Screen" function of your browser to print.

What if a checklist item doesn't apply to me?

Select the opt-out checkbox within the checklist item screen. You will need to opt-out of checklist items that don't apply to you, or you will not be able to submit your application.

Project Checklist Item Phase Detail		Return to Checklist		
Project	Sample 2017 RFP/2018 HTC R1 Project		Approval Status	Unsubmitted
Project Checklist Item	Access to Higher Performing Schools		Upload Status	Not Uploaded
Required File Extension	No requirement specified		Is Item Optional?	Yes
Due Date	6/15/2017		Checklist Item Opt Out	
Quick Link	View Resource			

I would like to provide supporting documents that don't seem to fit into another checklist item. Where should I save it?

There is an optional checklist item in each checklist called "Other Supporting Documentation." You can use this item to upload documentation that doesn't fit well elsewhere, such as letters of support, documentation of unique revenue sources, etc. Please make sure to name your document so it can be easily identified.

Can I pay my fees electronically through the Portal?

No. Any required fees will need to be mailed to Minnesota Housing along with the Fee Remittance Form. You can download a link to the Fee Remittance Form from your checklist in the Portal.

Do documents that require an original signature need to be mailed to Minnesota Housing?

The Portal allows for a paperless submission process (except for the Fee Remittance Form and the applicable fees). You do not need to mail any signature pages at the time of submission. Minnesota Housing will request physical copies of signatures on an as-needed basis.

Where do I submit Sponsor financials and Development Team Qualification Forms?

Sponsor financials and development team qualification forms are not submitted through the portal. You can submit these items through the Minnesota Housing Secure Upload Tool on our website. See our website for details on this process.


Checklist Submission Process

How long does it take to upload files and submit my checklist?

Files need to be uploaded to each checklist item (rather than one bulk upload). An upload should take between five seconds and two minutes, depending on the file size. Additionally, in order to submit your checklist, you must either upload a file or opt-out of a checklist item that doesn't apply to you, and

validate all file errors are addressed. Please allow extra time to submit in case errors do occur, as it can take up to 15 minutes for the system to detect errors and for you to receive an error message. Because of this, we recommend that you upload as you go, rather than waiting until the due date to upload all files.

Why don't I see a submit button?

The submit button only appears if you have uploaded a document to every checklist item or opted out of checklist items that are optional. At the top of the checklist you can see how many items are remaining.
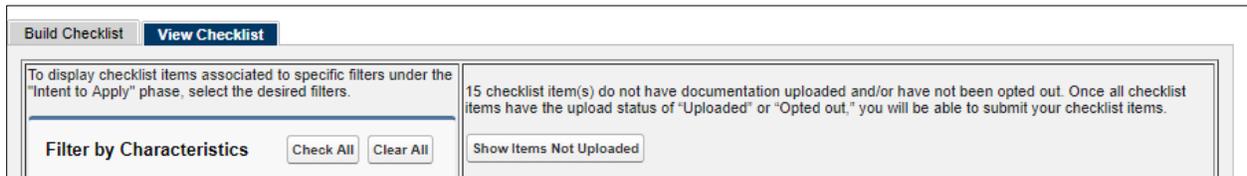
Once zero checklist items are remaining, a 'Submit' button will appear.

Do I have to press the 'Submit' button for my checklist to be considered submitted?

Yes.

How do I know my checklist was submitted?

An email will be sent to your email address that will confirm your checklist submittal. Additionally, all of the checklist items' approval statuses will change to 'Submitted' and will be locked so you will not be able to upload any more documents.

I've submitted my checklist but I need to make a change to a document. What do I do?

If the submission due date has not passed, you may contact mhfa.app@state.mn.us to unlock that checklist item. If the submission due date has passed you cannot upload any additional materials.

I pressed the 'Submit' button for my checklist, but I received an error about a file a few minutes later. The portal won't let me correct the file.

Contact mhfa.app@state.mn.us for assistance.

Files

Is there a maximum file size that can be uploaded to the Portal?

The maximum file size is 2 GB.

Can I upload more than one file to a checklist item?

Yes, with a few exceptions including the Multifamily Workbook, HTC Self-scoring Worksheet and Deferred Loan Priority Checklist, and the Contractors Compliance Activity Report. You will only be able to submit one file for each of these items. You can, however, update versions of the file in the event that it changed or had errors.

Why am I getting a file error message?

The most common reasons you are receiving a file error message include:

- Incorrect file version. Each funding round requires a year-specific version of the Multifamily Workbook or HTC Self-scoring Worksheet and Deferred Loan Priority Checklist. Download the correct version from your project checklist within the Portal.
- Incorrect Property number (D#) or Project number(s) (M#). You must include the D# and M# whenever requested in Minnesota Housing's forms. You can find the D# and M# in the upper right-hand section of the project page in the Portal.

Project

Sample 2017 RFP/2018 HTC R1 Project   Printable View

« Back to List

Project Phases [5] | Project Workbooks [2] | Project Documents: Customers [2] | Project Team [4]

Project Detail

Project Name	Sample 2017 RFP/2018 HTC R1 Project	Funding Round	2017 RFP/2018 HTC Round 1
Primary Address	400 Wabasha Street Street North, Suite 400	Project #	M17797
City	St. Paul	Secondary Project #	M17798
ZIP Code	55102	D #	D7890
County	Ramsey		
Project Status	In Process		

- Submission Deadline has Passed. If the checklist due date has passed, you will receive a message stating you cannot upload a file. For project specific-deadlines (typically in the pre-construction due diligence, 42M, and 8609 checklist), the assigned loan processor can adjust the deadlines. **NOTE:** extending out the submission deadlines can impact your closing timeline. Work with the assigned loan processor to understand how missing submission deadlines impacts your critical path.
- Incorrect file extension. For some checklist items, Minnesota Housing requires a specific file extension such as xlsm or PDF. The required file extension is listed under the Project Checklist Item Details section of a checklist item.

Project Checklist Item Phase Detail   [Return to Checklist]

Project	Sample 2017 RFP/2018 HTC R1 Project	Approval Status	Unsubmitted
Project Checklist Item	Multifamily Workbook	Upload Status	Not Uploaded
Required File Extension	xlsm	Is Item Optional?	No
Due Date	6/15/2017	Checklist Item Opt Out	☐
Quick Link	Download Document		

How do I upload a new version of an existing file?

To replace an existing file, click the file title to see more details.

A new window will open in the browser. From this new window, users can download, preview, upload, and view file version history. **NOTE:** Not all file types can be previewed. Click 'Upload New Version' in the left upper side of the screen.

Click 'Upload New Version' in the left upper side of the screen. Navigate to the updated file. Make a note about what has changed and click 'Upload New Version.'
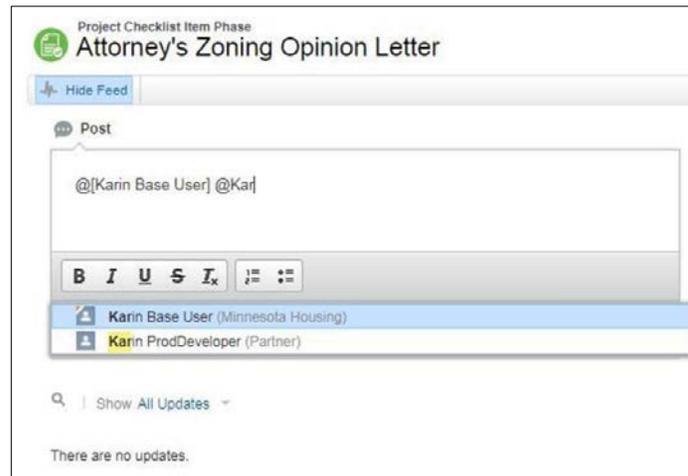
Chatter

What is Chatter?

Throughout the Portal, customers and staff are able to communicate with each other using Chatter. Minnesota Housing staff may use this tool to communicate with customers about checklist item approvals and revision requests, among other things. Customers can use this space to ask staff questions too. You can find the Chatter feed at the top of the page when viewing checklist items, workbooks, or project documents.

**How do I direct my chatter post to a specific recipient?**

To make sure that your intended recipient gets your message, '@mention' the user by typing the @ symbol, start to type the user's name, and then select the user's name from the dropdown before continuing with your message. Click 'Share' when you are ready to post your message. When you '@mention' the user, they get an email that includes the comment as well as a link to the Portal item related to the chat.

NOTE: You must be a Portal user to use Chatter. Only users that have been granted access to your project and Minnesota Housing staff can be @mentioned.

How do I know when someone sent me a Chatter message?

When someone '@mentions' you in a post, you will receive an email. Click 'View Post/Comment' to view the post or reply.
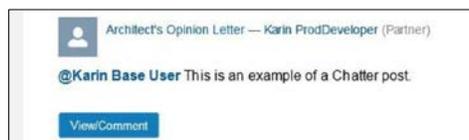

How do I respond to a chatter message?

Similar to email, if you are continuing a previous conversation and want to keep all of the responses together, click 'Comment' and type your response. Anyone previously '@mentioned' in the message will see your reply. You can bring new people into the conversation by '@mentioning' them too.
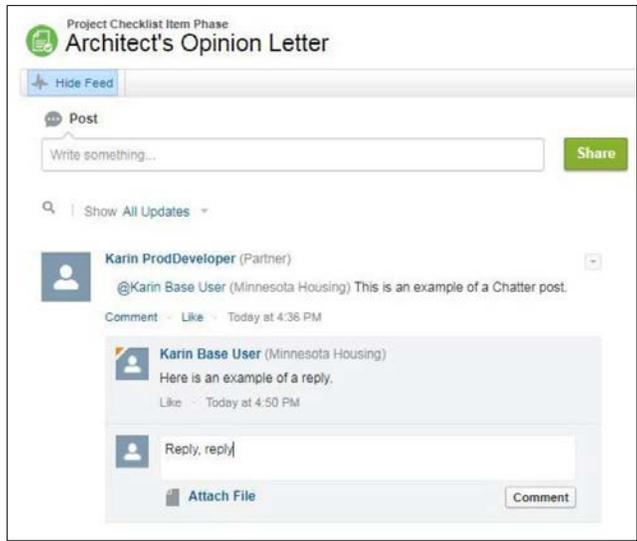
How do I start a new topic?

Similar to email, if you are starting a conversation about a new topic, create a new post.
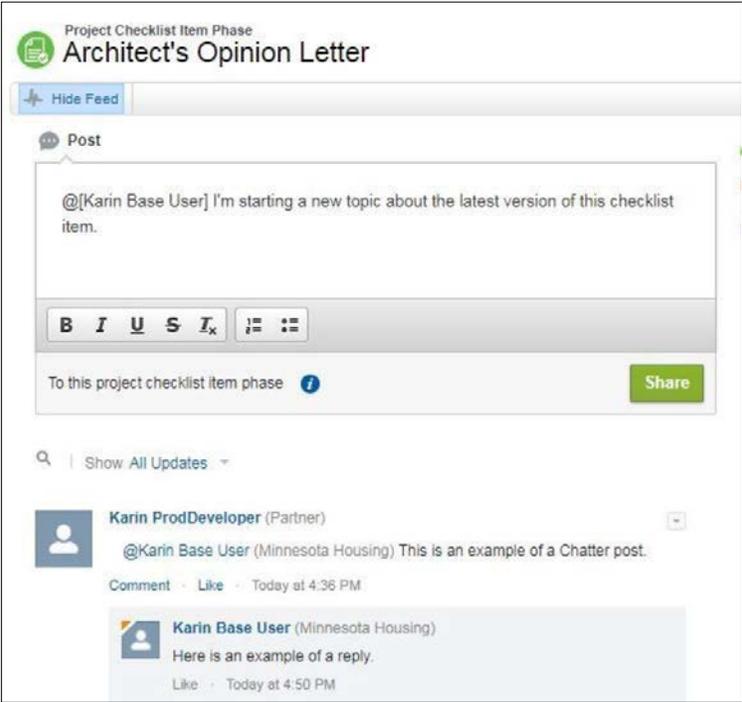
Supported Browsers

What browsers are supported?

Minnesota Housing uses the Salesforce platform to host the Multifamily Customer Portal. See Supported Browsers for Salesforce Classic.

Questions

Who do I contact if I am having technical issues with the Portal?

Contact mhfa.app@state.mn.us.

Who do I contact if I have project-specific questions?

Contact your assigned loan processor or underwriter.

How do I make suggestions for future Portal enhancements?

We love feedback! Submit suggestions in writing by emailing mhfa.app@state.mn.us. Please be as detailed as possible and include screenshots (as applicable) to help us understand your request. Expect a response confirming we received your request within 48 business hours. The Multifamily Technology Team will contact you with questions as needed.