



Multifamily Customer Portal  
Training Tutorials

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## Our Mission

Housing is the foundation for success, so we collaborate with individuals, communities and partners to create, preserve and finance affordable housing.

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## Who Needs a Portal Account

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### Applying for Funding

- In order to log and apply for funding you will need to have an account.
- Developer, Sponsor, Owner, and Processing Agent (if applicable).
- Approved staff can view ALL of their organization's projects.
- Processing agents can ONLY view projects that have been assigned by the Project Sponsor or Developer organization.
- Developers and project sponsors can see projects prepared by Processing agents on their behalf.

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### Selected Projects

- Checklists in the Portal include:
  - Pre- and Post-construction Due Diligence
  - Preliminary Determination (42M)
  - Carryover
  - 8609
- Facilitates the submission of all documents.
- Allows for collaboration on documents during the due diligence phases.
- Two to three individuals who will be the core team submitting documents.
- Funding and Collaborating Partners who have selected the development can also log in and view the project.

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### For More Information – Check Out Our Other Portal Tutorials

- Administration**
  - Who Needs a Portal Account
  - Setting Up or Changing User Accounts
  - Getting Started: Activating Accounts and Navigating the Portal
  - How to Reset Your Password
  - Communicating in the Portal
- Apply for Funding**
  - How to Start a Project
  - How to Build a Checklist
  - Managing the Pre-application, Intent to Apply, and Application Checklists
- Portal Functionality**
  - Working on an Individual Project
  - Managing Pre- and Post-construction Due Diligence Checklists
  - Sharing Project Workbooks
  - Supporting Documentation
  - Managing Housing Tax Credits Checklists

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**Questions?**

**Contact**  
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