MINNESOTA HOUSING

Quick Links: <u>Overview</u> |<u>Finding Open Funding Rounds</u> | <u>Apply for Funding |Project Team Access</u> <u>Request</u> | <u>Return to an Existing Project</u> | <u>Questions</u>

Overview

To apply for funding, users will create a project within the Multifamily Customer Portal. Think of a project as a homepage for your application. It contains checklists where you can upload application materials and (if applicable) is where you can access the Scoring Wizard to complete a self-scoring process.

Finding Open Funding Rounds

To find open funding rounds, click on **Funding Rounds** on the navigation menu.



On the new screen you will see a list of funding rounds that are currently accepting applications.

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	I Guidance the name of the funding round t	to learn more and apply	for funding. Questions? Co	ntact mhfa.app@state.mn.us		
	Open Funding Round		und - Is Active			\$
		Filtered by all funding ro			~	\$
	Sorted by Funding Round Name •	Filtered by all funding ro	 Funding Information Financing is available or 	n a year round basis. Application requirements vary g. Contact mn.housing@state.mn.us for more infor		\$ •

Click on the **funding round name** to view more details and apply for funding within that round.

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Apply for Funding Wizard

After you navigate to the appropriate funding round, click the **Apply for Funding** button to create a project. You will need:

- Project name and address
- Basic project info such as estimated number of units, total development costs and total construction costs. Don't worry: you can edit these fields later if needed by going to the Project details tab after your project is created!
- Contact information for the developer, sponsor and processing agent (if applicable)

Eunding Round 2020 Available Financing	Apply for Funding
Funding Round Name 2020 Available Financing	Close Date/Time 12/31/2020, 12:00 PM
Required Workbook Version Version 2/15/2019	
Funding Information	
Financing is available on a year round basis. Application requirements vary deper connected with a staff person to talk specifics of your proposal prior to applying.	nding on the type of financing you are seeking. Contact mn.housing@state.mn.us to be

Clicking the Apply for Funding button will launch the Apply for Funding Wizard that will guide you through the process of creating a project.

		Apply f	or Funding		
AINNESOTA HOUSING	Funding Round Details Name: 2021 RFP/2022 HTC Round 1 Round Type: RFP/HTC Round 1			4/14/2021, 11:00 AM 7/15/2021, 12:00 PM	
Project Details	Project Snapshot at Applic	Sponsor Details	Developer Details	Processing Agent Details	Review and Create Project
		Projec	t Details		
lease enter basic inform	nation about your project. For instructions on	how to find the coordinate	es of the project site, visit Minne	sota Housing's Communities Pro	files Maps page.
roject Name			Primary Address	, and the second s	
			Country United States		
ame(s) project formerly kno	wn as		Street		•
			Sileei		
revious Property Number (E)#), if known				
			City		State/Province
Previously applied/received	funding				Minnesota 👻
Choose a Value		•	Zip/Postal Code		
Is this a Dual Application?	0				
Choose a Value		•	County 1		
Primary Proposal Type					
Choose a Value		•	Latitude		
			Longitude		
			Longiture		

Features are available to assist with navigation or provide additional information. Features include:

• **Path.** You will see a path at the top of the Apply for Funding Wizard. Clicking on a header within the path will allow you to jump from page to page. NOTE: Many pages will require you to respond to all questions prior to navigating to the next page.

	(Project Details	Project Snapshot at Applic	Sponsor Details	Developer Details	Processing Agent Details	Review and Create Project
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- Information icons. For some questions, you can get additional help text by clicking on the grey 'i' icon to the right of the field name.
- **Buttons.** Buttons are available to allow you to move from page to page or confirm an action. Examples include Next, Previous, Create Project, and Add Team Member.
- Links. You can find links to pertinent webpages or resource guides. When you hover your mouse over a link, the link text will be underlined.
- **Error messages.** Error messages questions appear in red below the related question. Typically, error messages appear if you have missed a required field.

While working in the Apply for Funding Wizard, keep in mind:

- You must respond to all questions displayed. If you miss a required field, an error message will appear when you click the Next button.
- Your answer to a question may add or remove additional questions. For example, on the Processing Agent Details tab, if you select 'Yes' when asked if the processing agent is part of the development team, you will be prompted to enter information about the processing agent contact.
- Information on the 'Project Snapshot at Application' can be updated later. After your project is created you can update details about your project by clicking on the project's Details tab.
- Click the **Next** button in the bottom right corner of the screen to move to the next page.
- If you no longer want to apply for funding, click **Cancel Return to Funding Round.**
- **Review for accuracy**. On the 'Review and Create Project' tab you can see all the project data you've entered. To edit any information, click on the corresponding section header in the path at the top of the page or use the Previous button to navigate.
- When you are ready, click **Create Project.** NOTE: The Create Project button is only available on the 'Review and Create Project' tab.

Cancel - Return to Funding Round	<< Previous	Create Project
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You will see a new message congratulating you on successfully creating a project.

	Ар	ply For Funding
MINNESOTA HOUSING	Eunding Round Details Name: 2021 RFP/2022 HTC Round 1 Round Type: RFP/HTC Round 1	Open Date/Time: 3/22/2021, 12:00 PM Close Date/Time: 7/15/2021, 12:00 PM
Congratulations! You	ur project has been successfully created.	
Click All Done - Show Characteristics guide		ccess checklists, or use the scoring wizard (if applicable). Refer to the How to Setup and Change Project
	bers to complete a project team access request. Project team a project must complete the project team access request.	ccess allows users to view and/or edit a project on behalf of the sponsor. A sponsor or an authorized
	d with an organization that has project access may be able to se a additional functionality depending on the authorization level se	ee high-level project information even if they are not assigned to the project. Assigning a person to the elected (e.g. Read vs. Read/Write).
All Done - Show Pro	ject	Add Team Members Add Another Project

At this point you can:

• Click All Done – Show Project to go to your project to set up project characteristics, access checklists, or use the scoring wizard (if Applicable).

- Click Add Team Members to complete a project team access request. See the <u>Project</u> <u>Team Access Request</u> section of this guide for more details.
- Click Add Another Project to create another project within the same funding round.

Show Project	Add Team Members	Add Another Pro

Project Team Access Request

All Done -

Project sponsors can choose to give individuals outside of their organization access to the project to assist with the application and/or due diligence. Project team access requests will be processed by Minnesota Housing within two business days.

To request team member access when creating your project:

- On the congratulations page, click Add Team Members.
- Review the information provided on the Project Team Access page. If you'd like to proceed click **Add Team Member.** If you no longer want to submit a request to add team members, click **Finished View Project** or **Finished Add Another Project**.

	Aţ	pply For Funding	
MINNESOTA HOUSING	Eunding Round Details Name: 2021 RFP/2022 HTC Round 1 Round Type: RFP/HTC Round 1	Open Date/Time: 3/22/2021, 12:00 PM Close Date/Time: 7/15/2021, 12:00 PM	
		Project Team Access	
reason the access or		eam Access request to allow project access to be granted to people d after they have been granted read or read/write privileges, please c	
	n organization that has project access may be able to see high nal functionality depending on the authorization level selected	h-level project information even if they are not assigned to the project d (Read vs. Read/Write).	t. Assigning a person to the project
team access request		e granted access based on their organization's involvement in the pro FACP directly to Minnesota Housing. FACP are funding partners that	
would be similar to the	e following: casey.smith@abccompany.com. Minnesota Housir	ted with an organization are used. For example: If the affiliated organ ng highly discourages the use of non-organizational emails due to ris ons regarding any information you submit, staff will contact you to ver	sks associated with a user having
Add Team Member			
Finished - View Proj	act		Finished - Add Another Project

If you've selected Add Team Member, you will be prompted to enter information about the team member including:

- First and last name
- Email

- Company
- Team Member Role. Options include Architect, Attorney, Compliance Officer, Developer, funding or Collaborating Partner, Lender, Management Company, Processing Agent, Service Provider, Syndicator and Title Company
- Access Type.
 - Select **Read** if the contact needs to be able to view project data, but will not upload documents, communicate via chatter or modify fields.
 - Select **Read/Write** if the contact needs to be able to upload files, communicate via Chatter or modify fields.
- Comments. This is an optional field.

	Apply For Funding
	Add Project Team Contact
First Name	Email
	you@example.com
Last Name	* Team Member Role
	Choose a Value 🔻
Company	* Access Type
	Choose a Value 🔻
Comments	
Cancel	Save Save and New

Click **Save** to add one contact or **Save and New** if you'd like to request team access for multiple contacts. If you no longer wish to add a contact, click **Cancel.**

To request team member access after you have created a project:

- Navigate to the project.
- Click the **Project Team Access** tab.

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acces proje • Requ	ss request. NOTE: Users ct gives them additional fr uest Project Team Acces	affiliated with an orga unctionality depending s. Click the 'New' but	nization g on the tton belo	n that has project acc authorization level s low to request access	cess seleo s for	a project on behalf of the sponsor, may be able to see high-level proj cted (e.g. Read vs. Read/Write). r a new project team member. To b users to be added to the project te	ect information even if they a e added to a project team an	are not assigned to the pro	ject. Assigning a perso	n to ti	he
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items • l	•		~ L	.ast Name	~	Email 🗸	Processing Status V	Team Member R ∨	🕸 🔹 C	N	lew
items • l	Updated a few seconds ago			.ast Name Fodd		Email ~	 ✓ Processing Status ✓ Access Requested 	Team Member R Y Developer	• -		lew

• Click **New** to add a new team member.

	Project Team Access • Updated a few seconds ago										\$ • C	N	ew
	Project Team Acc 🗸	First Name	\sim	Last Name	~	Email	\sim	Processing Status	~	Team Member R ∨	Created Date	\sim	
1	PTA-00024	Tim		Todd		ttodd@abcdevelopment.com		Access Requested		Developer	4/27/2021, 4:00 PM		▼
2	PTA-00025	Elizabeth		Huotari		elizabeth@gmail.com		Access Requested		Architect	4/27/2021, 4:02 PM		
												Vi	ew All

• Enter information about the project team member and click save.

Return to an Existing Project

Once you (or a representative working on behalf of your organization) create a project, you can return to it at any time by going to the Projects tab in the navigation menu.

MINNESOTA Home Funding Rounds	Projects	۹ 🌲	Karin Developer
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Click on the **Project Name** link within the Project Name column to go to the project's main page.

🝟 All Projects 🔻 🖈													
	11 items • S	i liems • Sorted by Project # • Filtered by All projects - Project Status • Updated 6 minutes ago							Q sample	۲	\$ • C		
		Project Name 🗸 🗸	D# ∨	P↓∨	Se ∨	Primary Address 🗸 🗸	City ~	c ~	Reg ∨	Account Name	✓ Funding Round ✓	Proj 🗸	
	1	Sample RFP Project	D9876	M18792	M18793	400 Wabasha St	St Paul	Ramsey	Metro	TEST Developer Acc	2021 RFP/2022 HTC	In Process	•
	2	Sample 2021 HTC 4		M18665		400 Wabasha St	St Paul	Aitkin		TEST Developer Acc	. 2021 HTC 4% Only R	In Process	

Don't see the project you are looking for? You can change the list view by selecting the dropdown arrow next to the list header. Select 'All Projects' to view all projects that are available to you.

😐 Recently Viewed 🔻 🖡									
23 items LIST VIEWS									
		All Projects							
1		My Assigned Projects							
2	~	Recently Viewed (Pinned list)							
		Recently Viewed Projects							
3		III 10.51.0 III 10000 III 10000							

Questions

Contact <u>mhfa.app@state.mn.us</u>.