Multifamily Customer Portal User Guide

April 2017

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Terms and Conditions

As a condition of your use of Minnesota Housing Finance Agency's ("Minnesota Housing") website, you are entering into an agreement with Minnesota Housing that you will not use the Minnesota Housing website for any purpose that is unlawful or prohibited by these terms, conditions, and notices. You may not use the Minnesota Housing website in any manner which could damage, disable, overburden, or impair the Minnesota Housing website or interfere with any other party's use of the Minnesota Housing website. You may not modify, copy, distribute, transmit, display, perform, reproduce, publish, license, create derivative works from, transfer, or sell any information obtained from the Minnesota Housing website. Users of the Minnesota Housing website are responsible for checking the accuracy, completeness, currency and/or suitability of all information. Minnesota Housing makes no representations, guarantees, or warranties as to the accuracy, completeness, currency, or suitability of the information provided via this website.

In addition, information in Minnesota Housing's Portal is subject to the Minnesota Government Data Practices Act, Minnesota Statutes chapter 13.

Portal is an online information exchange tool. If any information is incorrect, missing or incomplete, then it is the Developer's responsibility to inform Minnesota Housing of the error. The Developer may designate contacts that have access to Developer's projects in Portal. All activity conducted by Developer's designated contacts will be deemed by Minnesota Housing to have been submitted by the Developer. It is the Developer's responsibility to contact Minnesota Housing to change contact access due to changes in staffing or for other reasons. Developer agrees that any change in contact access may take up to two business days after written notice to Minnesota Housing (the "Effective Date") to become effective. Developer further agrees that any activity taken by Developer or Developer's contacts prior to the Effective Date is the responsibility of Developer and Minnesota Housing will have no liability for any action taken by Developer or Developer's contacts during such time.

Chapter 1 – How to Request an Account

1.01 To request a **new** account, click the following link.

> **IMPORTANT NOTE**: When you request an account, you must include contact information for your organization, as well as a list of each staff person from your organization who will need access to the Portal for this funding round.
> - For example, you should list all staff within your organization who will be submitting applications for funding.
> - If Minnesota Housing has questions regarding the list you submit, staff will contact you to verify information.

1.02   Fill out the following information and click 'Submit.'

1.03   Fill out the following information and click 'Next.'

1.04   Fill out the following information and click 'Next.'

1.05   Review the information you entered and select 'Next' when

1.06   Once all information is accurate, select 'Finish' to complete your request for a portal account.

1.07   Request complete!

- If you are submitting your request **prior to April 17**, you should receive your Welcome Email on April 17.
- If you are submitting your request **after April 17**, you should receive your Welcome Email in one to two business days.
- If you **do not** receive a Welcome Email, please check your junk folder.
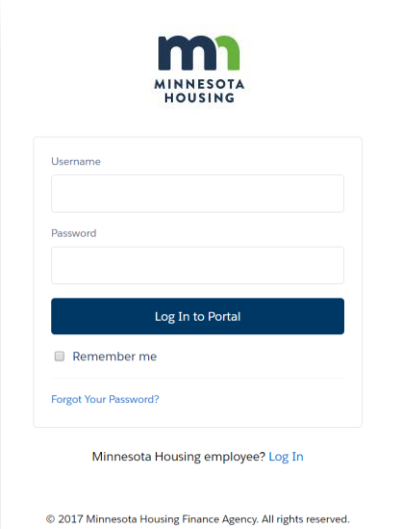- If you are still unable to locate your Welcome Email, please email mhfa.app@state.mn.us.

1.08   Your Welcome Email will contain your User Account login information and will be sent to you **via an email from Minnesota Housing**. This email will have a link along with your login username, which will be your email address. You will need to click the link and set up a password to activate your User Account for the Portal.

IMPORTANT NOTES:
- If you are an **approved user and staff person** of an organization, you will be able to view **all** your organization's projects. (For example, if you are a project manager with ABC Development and have a User Account, you will be able to view all of ABC Development's projects listed in the Portal.)
- If you are a processing agent, you will only be able to view those projects that you have been assigned to by the project sponsor or developer organization. (For example, if you are a processing agent and you are working on one project for ABC Development, you will only be able to see that one project. You will **not** be able to see all of ABC Development's projects.)
- The developer or project sponsor will be able to view any projects prepared by processing agents on their behalf.

Chapter 2 – How to Log In

2.01   Click the URL for the customer portal: https://mnhousing.force.com/MultifamilyPortal/login

2.02   Enter your Username. (If you do not have a Username, request one here.)
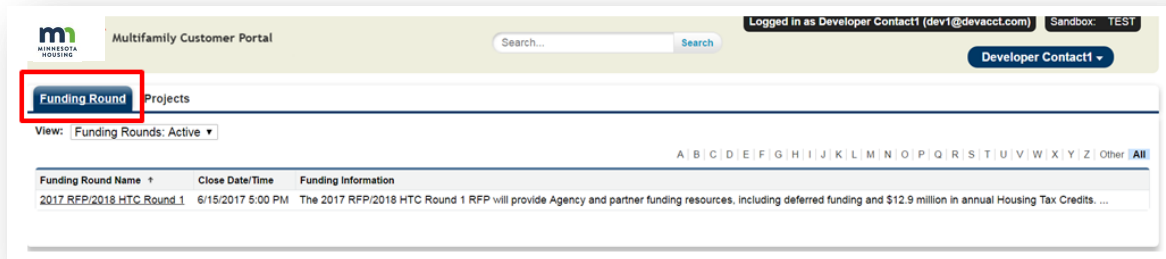
2.03   Enter your Password. (If you forgot your Password, click 'Forgot Your Password?' and follow the instructions.)

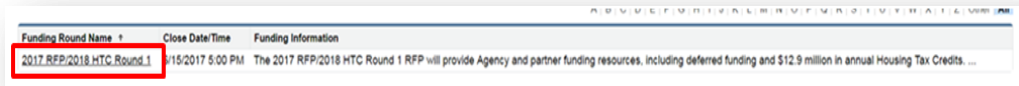2.04   Click 'Remember Me' for easier access in the future.

2.05   Click 'Log In to Portal.'

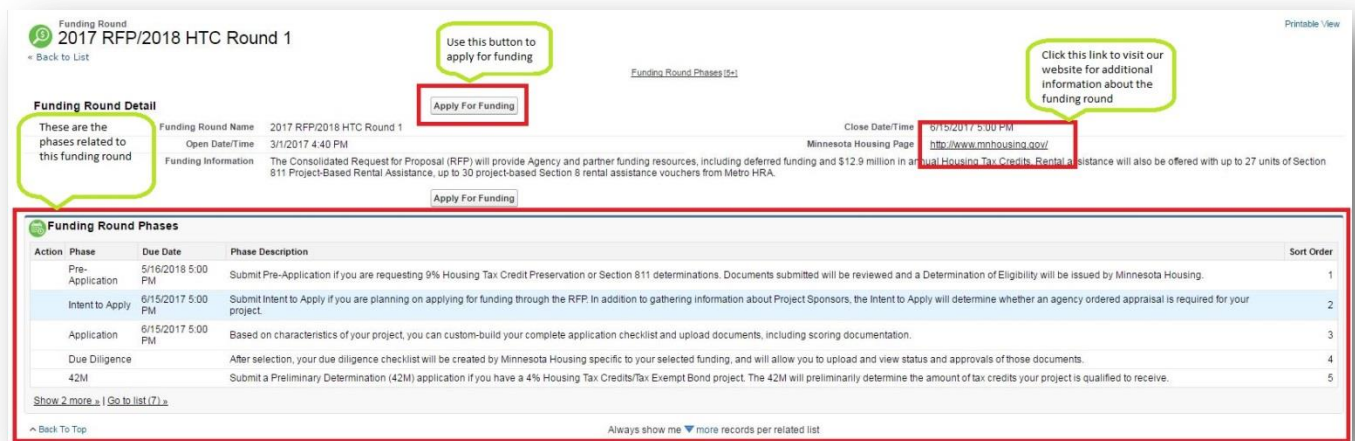## Chapter 3 – How to Apply for Funding

3.01   Select the 'Funding Round' tab.

3.02   Select the appropriate Funding Round by clicking on the 'Funding Round Name' field.

3.03   Review the details of the Funding Round.

3.04   Once you verify you've selected the correct Funding Round, to apply, click the 'Apply for Funding' Button.

3.05   Complete the 'Development Details' section.

3.06   Complete the 'Developer Information' section. (All fields are required.)

3.07   Complete the 'Project Owner Information.' (All fields are required.)

Project Owner Information

Project Owner Company	
Project Contact First Name	
Project Contact Last Name	

3.08   Complete the 'Project Sponsor Information.' (All fields are required.)

Project Sponsor Information

Project Sponsor Company	
Project Sponsor Contact First Name	
Project Sponsor Contact Last Name	

3.09   Complete the 'Processing Agent Information.' (All fields are required. Enter 'NA' if not applicable to your project.)

Processing Agent Information (Enter 'NA' if not applicable)

Processing Agent Company	
Processing Agent Contact First Name	
Processing Agent Contact Last Name	

3.10   Review all sections, making sure the information you entered is accurate.

3.11   If all the information is accurate, click:
   a. 'Save' (if you are only setting up one project at this time; you can always apply for funding at a later date).
   OR
   b. 'Save & New' (if you are setting up multiple projects at this time; you can always apply for funding at a later date).
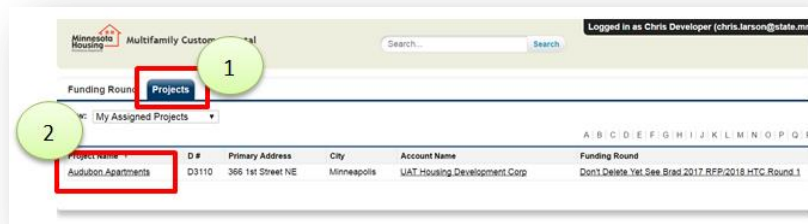   **OR**
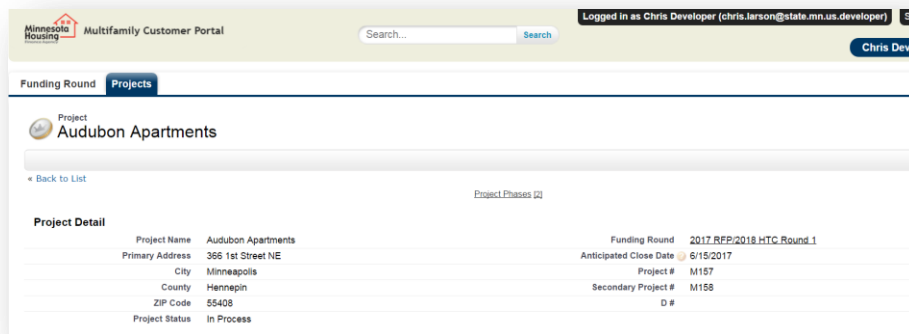   c. 'Cancel Application' to return to the Funding Round detail page.

Apply for Funding   Save   Save & New   Cancel Application

Chapter 4 – How to Set Up Your Intent to Apply Checklist

4.01   Click the (1) Projects tab and then (2) Select the appropriate project on the 'Projects' Tab.

4.02   From your 'Project Detail' page, validate a second time the information you submitted is correct.

- Your anticipated close date is estimated to be 12 months after Selections occur. If you are Selected, Minnesota Housing will update this date to reflect the actual anticipated close date.
- You will automatically be assigned two Project Numbers starting with the letter 'M' (M#).
- Your D# (aka Property#) is your Development Number; Minnesota Housing will assign this later in the process.
- Project Status should be displayed as 'In Process.'

4.03   Select the link 'View Intent to Apply Checklist.'

Intent to Apply
Submit Intent to Apply if you are planning on applying for funding through the RFP. In addition to gathering information about Project Sponsors, the Intent to Apply will determine whether a Minnesota Housing ordered appraisal is required for your project.

4.04   Under the 'Intent to Apply Characteristics,' the Common Intent to Apply Forms characteristic is selected by default because the forms are required for all projects. Select whether an appraisal is needed for a new construction or a rehabilitation project.

4.05   Help text will appear by hovering your mouse over the yellow question mark next to the project characteristic.

4.06   After you have made your selection, click the 'Create Checklist' button.
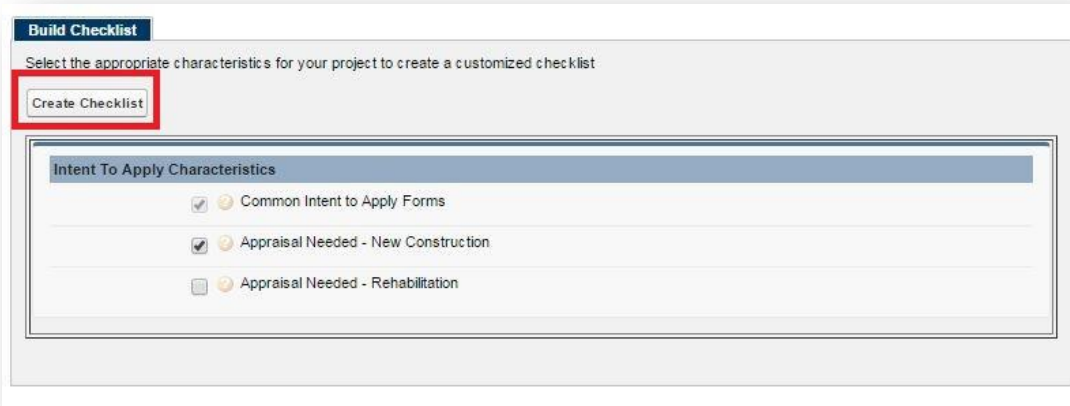
4.07   Upon successful creation of your checklist, you should now see the 'View Checklist' tab.
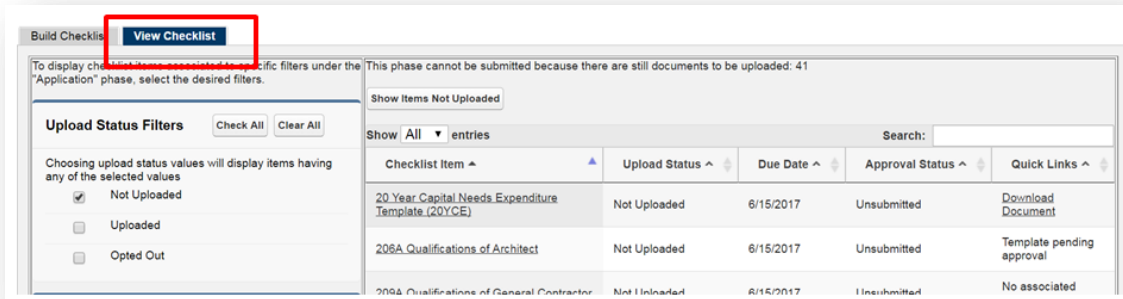
Congratulations, you have just created your <u>Intent to Apply</u> customized checklist!

Chapter 5 – How to Set Up Your Application Checklist

NOTE: If you want to continue working on your Intent to Apply checklist before setting up your Application checklist, skip to the 'Managing Your Checklist' Section. You can always come back and setup your Application at a later time.

5.01   Select the link 'View Application Checklist.'

Application Checklist
Based on characteristics of your project, you can custom-build your complete application checklist and upload documents, including scoring documentation.

5.02   Under the 'Application Characteristics,' Common Application Forms and HTC Self-Scoring Worksheet & Deferred Priority Checklist Supporting Documents are selected by default. These characteristics apply to all projects. Select all other characteristics that relate to your project.

5.03   Help text will appear by hovering your mouse over the yellow question mark next to the project characteristic.
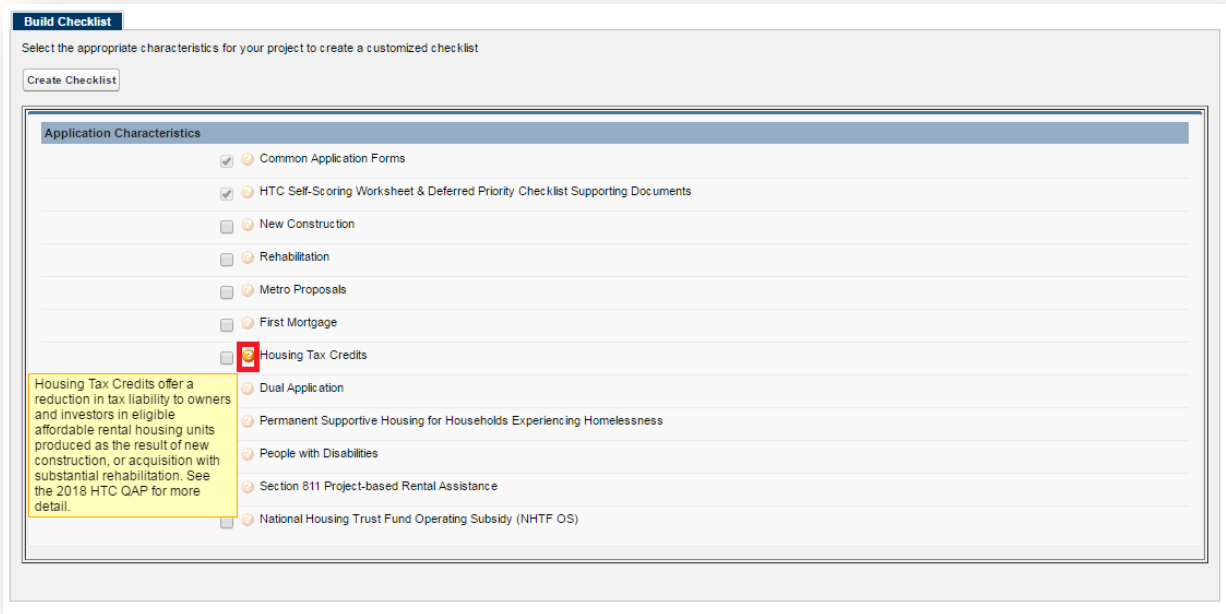
5.04   After you have made your selection, click the 'Create Checklist' button.
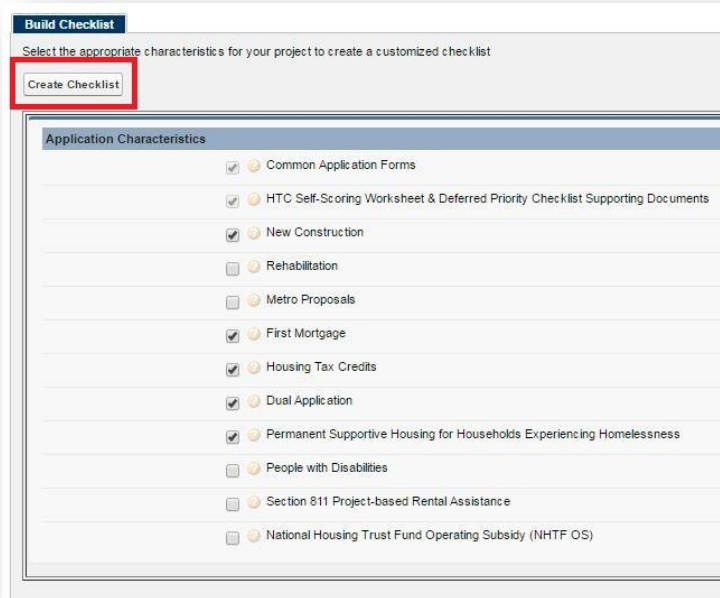
Congratulations, you have just created your <u>Application</u> customized checklist!

5.05   Upon successful creation of your checklist, you should now see the 'View Checklist.'

Chapter 6 – How to Manage Your Checklist

NOTE: By default, you will automatically be directed to the 'View Checklist' tab (if you are not on this tab, select the 'View Checklist' tab).
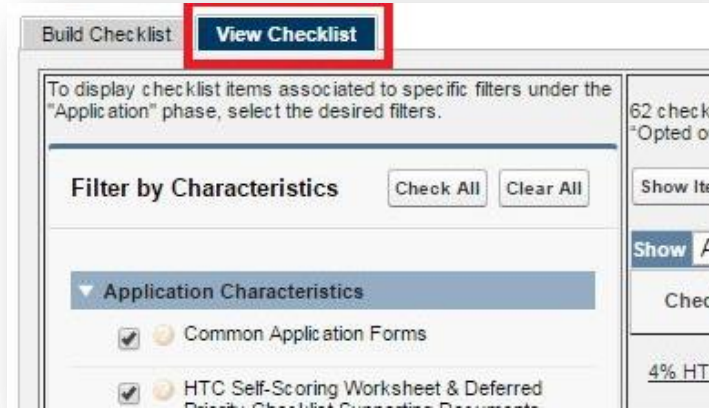
6.01   Checklist 'Dashboard.'

NOTE: See the following screenshots and the corresponding Checklist Sections and Functionality Description below.

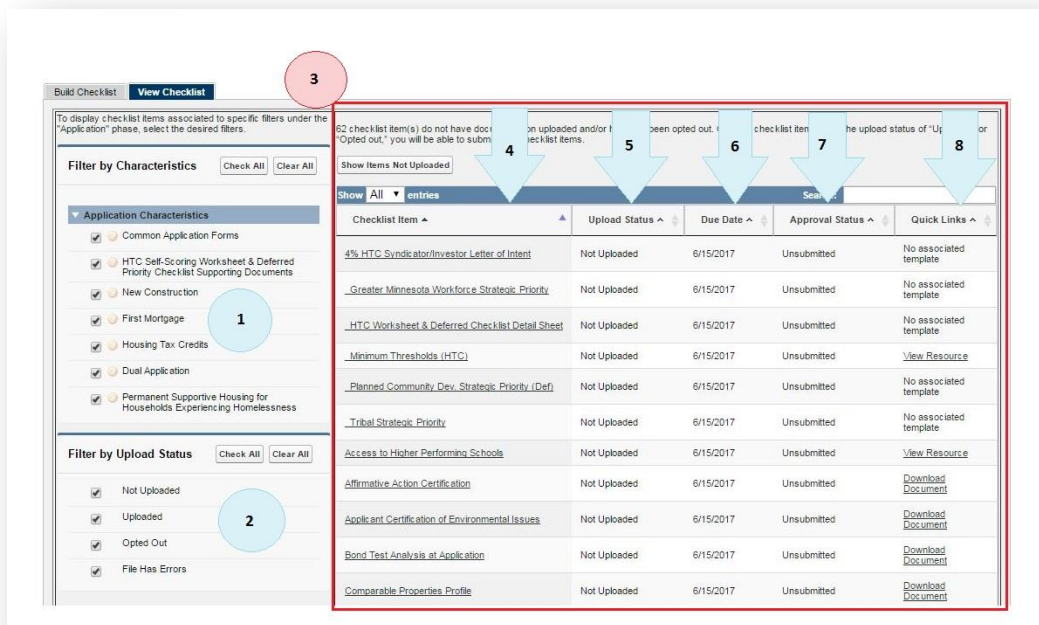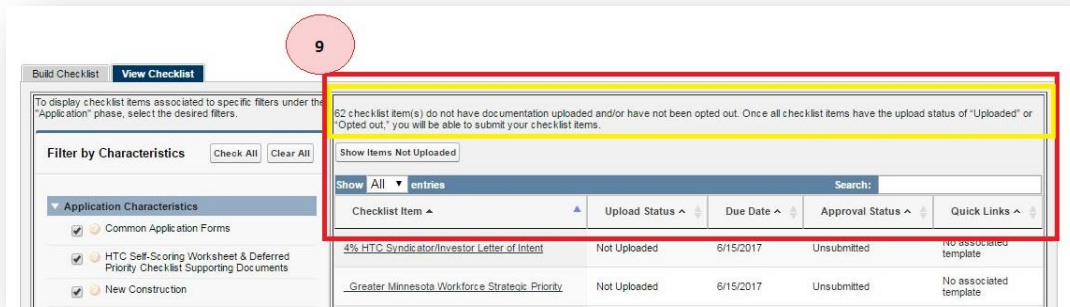| Project Checklist – Descriptions and Definitions		
View#	Description	Details
1	**Upload Status Filter** option	Allows user to filter what is displayed in the Checklist View (3) based on the upload status (whether or not documents have been uploaded).
2	**Filter by Characteristics** option	Allows user to filter what is displayed in the Checklist View (3) based on the characteristics previously selected on the 'Build Checklist' tab.
3	**Checklist View**	Displays all the checklist items required for you to submit based on your selected project characteristics on the 'Build Checklist' tab.
4	**Checklist Item**	This field displays the name (s) of item(s) required for submission.
5	**Upload Status**	This field indicates whether you have: • 'Uploaded' File(s) → you have successfully uploaded at least one (1) file to this checklist item. • 'Not Uploaded' file(s) → indicates that you have not uploaded any file(s) to this checklist item. • 'Opted Out' (if applicable) → indicates that this checklist item is not relevant to your project. Only applicable on certain checklist items. • 'File Has Errors' → indicates the file you uploaded has errors, see the error messages by clicking the checklist item.
6	**Due Date**	This field indicates the due date of the checklist item.
7	**Approval Status**	This field indicates whether you have submitted your checklist items or not.
8	**Quick Links**	This is a hyperlink to documents, websites or resources provided by Minnesota Housing.
9	**Checklist Submission**	This is a running total of the number of checklist items that either need to have documentation uploaded or will have the option to 'opt out' (if applicable). Once the status of **ALL** checklist items indicates 'Uploaded,' a 'Submit for Review' button will be enabled.

6.02   Additional Checklist Functionality – If you want to search for a particular checklist item, simply click in the search box and start typing. This search will find matches from **ANY** of the fields on the checklist.
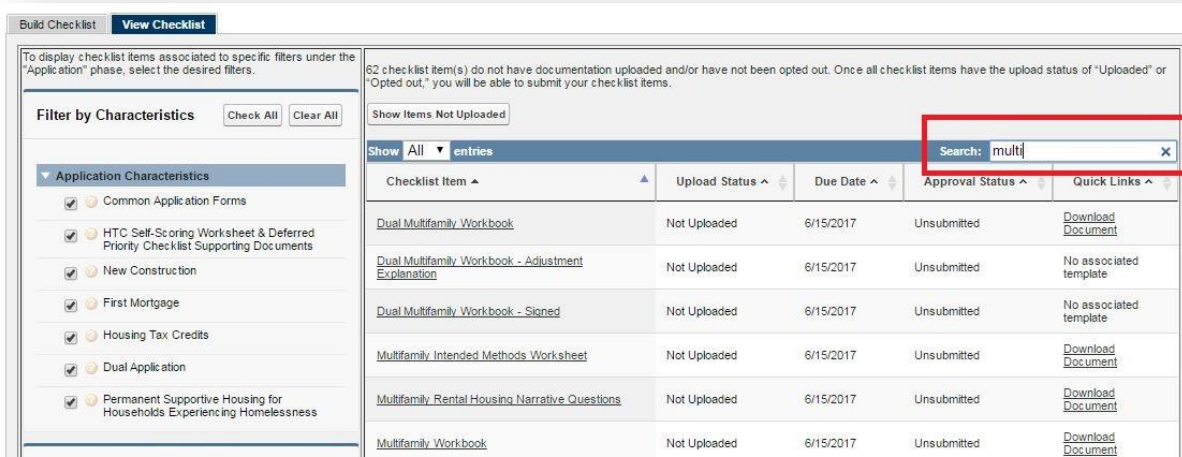
6.03   Additional Checklist Functionality – Changing the number of checklist items to be displayed can be done by selecting the 'Show Entries' dropdown list.
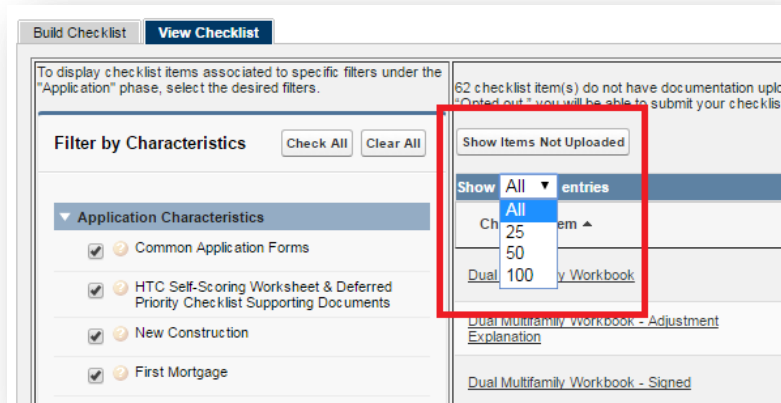
Chapter 7 – How to Upload the Documentation to Your Checklist

7.01   Select the checklist item you would like to work on by clicking the checklist item name.
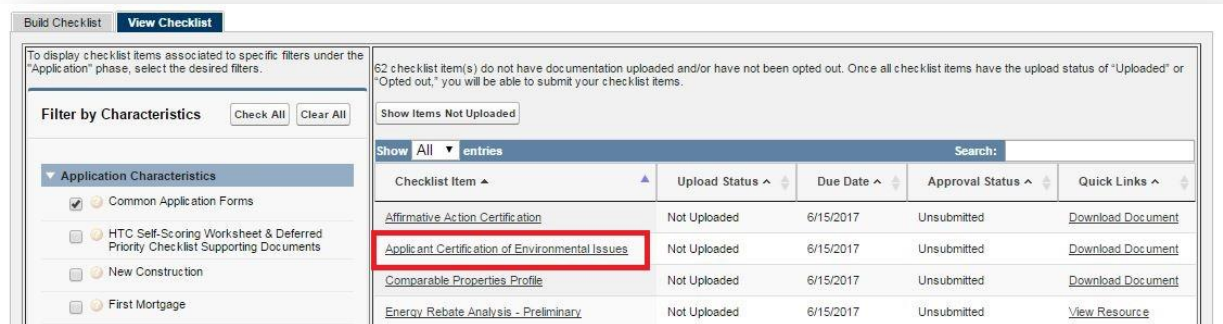
7.02   To upload a **new** or **additional** file: Click the 'Upload Files' button.
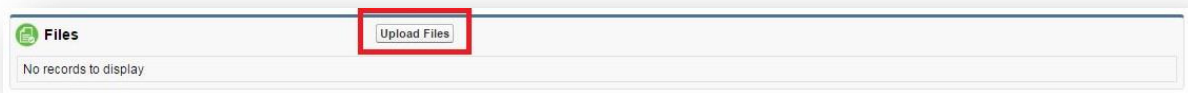
7.03   Locate and select the file you would like to upload.
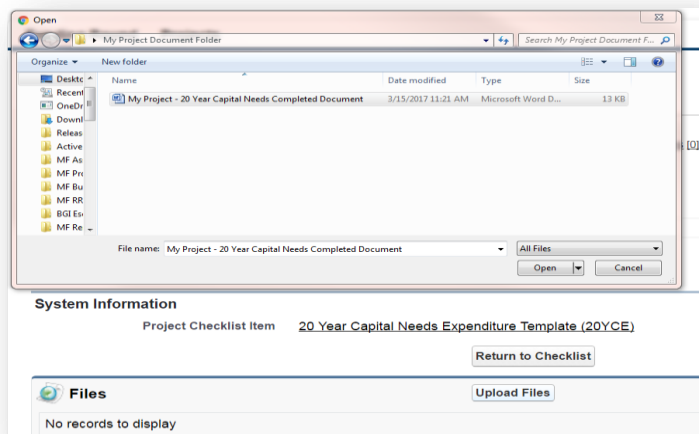
7.04   Select 'Open' button.
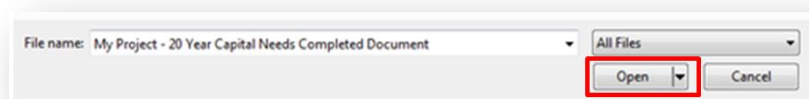
7.05   Select 'Close' button.
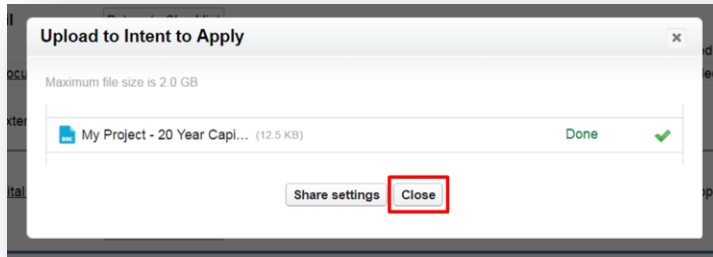
7.06   Verify the correct document was uploaded properly.
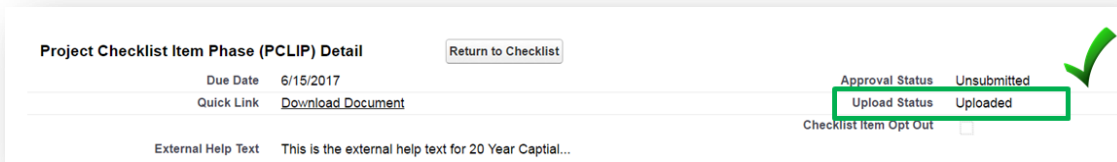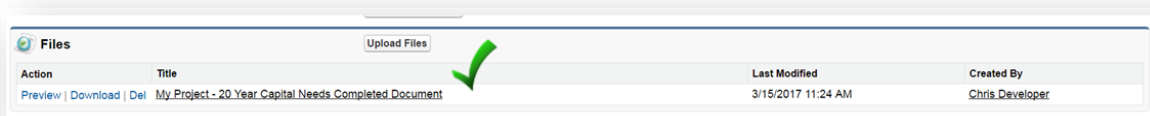
7.07   Repeat previous steps to upload all additional files, as necessary.

7.08   To **update** an **existing** item previously uploaded, click the Checklist Item Title.
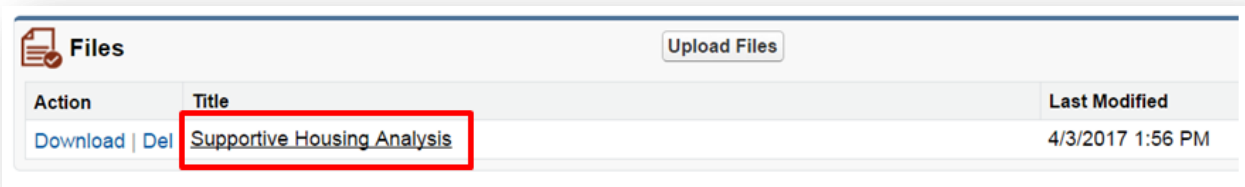
7.09   Click 'Upload New Version.'
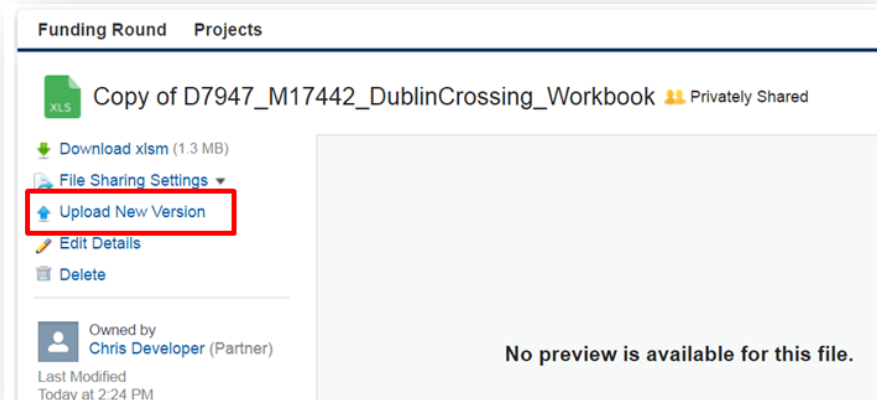
7.10   (1) Click 'Choose File', (2) Identify what changed, (3) locate the new file, and (4) Click 'Upload New Version.'
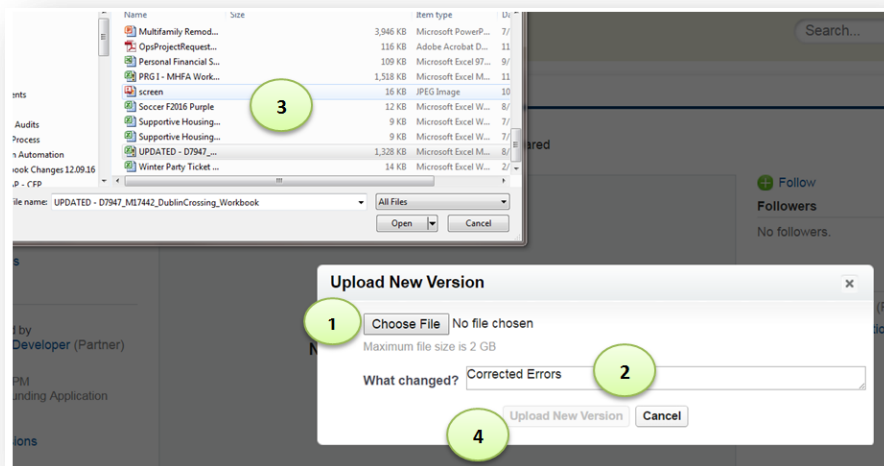
7.11   Verify the new version was successfully uploaded.
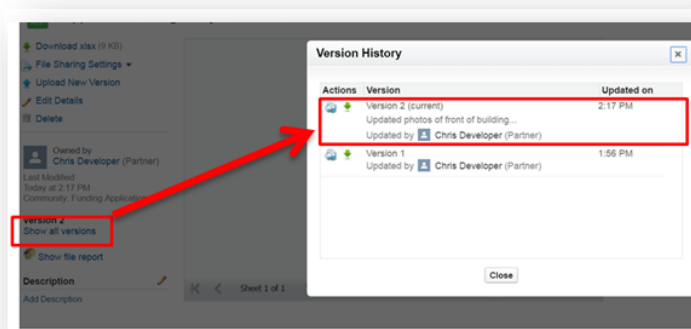
7.12   To return to the checklist item from the file upload page, Click the Phase name, such as 'Intent to Apply' or 'Application' link (this will depend on what Phase you are in).
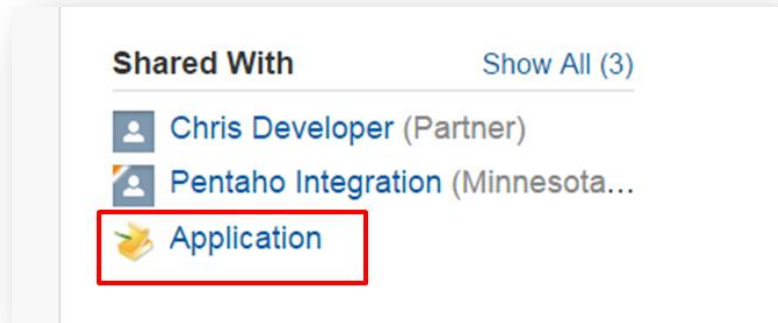
7.13   If a checklist item does not pertain to your project, you may be able to 'Opt Out' of the item by checking the 'Checklist Item Opt Out' button.

NOTE: Check to see if this item is optional or required by reviewing the 'Is Item Optional?' field (screenshot below). If this item is NOT optional, it is REQUIRED for you to submit. Contact Minnesota Housing staff if you have any questions about your required documentation.
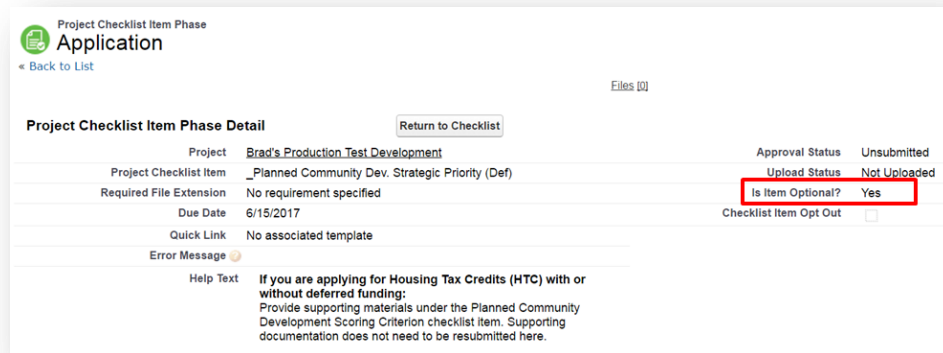
7.14   Double-click the 'Checklist Item Opt Out' Box.
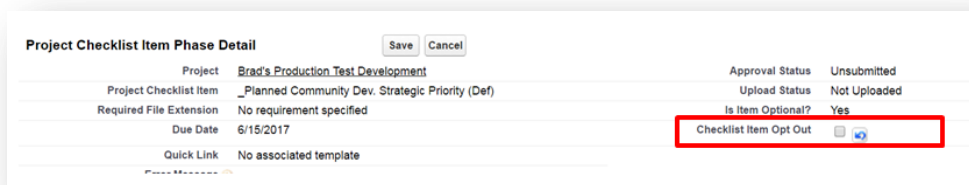
7.15   If you are able to opt out of a checklist item, check the BOX next to 'Checklist Item Opt Out' and select the 'SAVE' button.

7.16   Verify that the Upload Status has updated to 'Opted Out.'

7.17   To return to the checklist, select the 'Return to Checklist' button, found at the top and center of this page.

7.18   Once your documentation is uploaded, the system checks for certain features that must be added by you. For instance, a Workbook item requires an M# and a D#, and if these items are not added, the system will generate an error message that you resolve this issue prior to submitting your checklist. Here is what you will see when there is an error or errors with the checklist item: 'File Has Errors.'
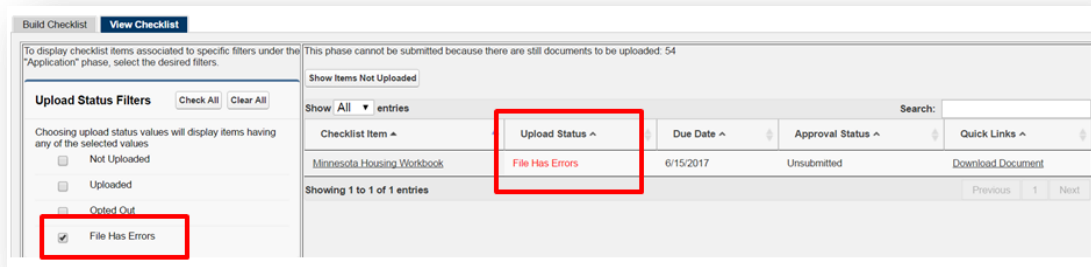
7.19   To resolve, click the 'Checklist Item' link.
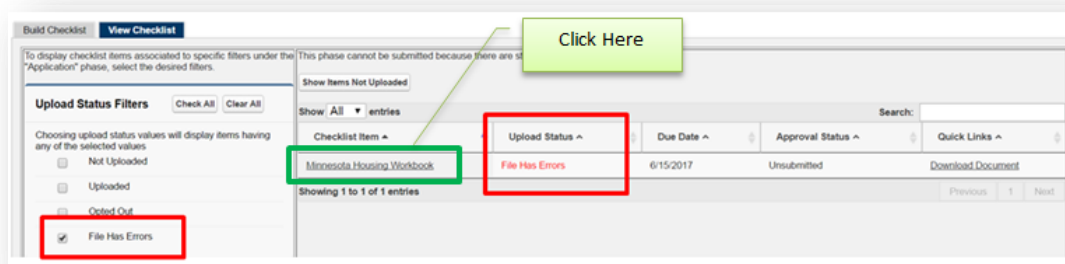
7.20   The Errors will be listed within the 'Error Message' field, for Workbooks and Score Sheets only (if applicable). Please correct these items on your document, and then replace the current checklist item with your edited document.

Error Messages for Workbooks

Error Description	Error Message	Details/Instructions
Invalid Workbook Version	"Invalid Workbook Version. Please download the correct version from the Quick Link on this Checklist Item, enter your project data then re-upload your workbook."	The Portal restricts which versions of the Workbook will be accepted, the version you uploaded is not valid. Please click on the Quick Link to download the most current version of the workbook. Re-enter your data and replace the existing 'File with Errors' by re-uploading the corrected Workbook.
Invalid/Missing D# (Development Number)	"The D# in your workbook does not match the D# on the Project in the Portal. Please correct and re-upload your workbook."	Your project has been assigned a D#, which can be found in the Project Detail section of your project. This number must be entered on your Workbook, prior to uploading. Please enter this D# on the Project Description Tab of your Workbook and replace the existing 'File with Errors' by re-uploading the corrected file.
Invalid/Missing M#	"The M# in your workbook	Your project has been automatically

(Project Number)	does not match the M# on the Project in the Portal. Please correct and re-upload your workbook."	assigned two Project Numbers (M#), which can be found in the Project Detail section of your project. These numbers must be entered on your correct Workbook, prior to uploading. • Multifamily Workbook = Project # • Dual Multifamily Workbook = Secondary Project # Please enter this M# on the Project Description Tab of your Workbook and replace the existing 'File with Errors' by re-uploading the corrected file.
General Errors	"Your workbook contains errors. Please resolve all errors and re-upload your workbook."	Your Workbook contains errors, please re-open your workbook and click 'save' and correct all errors. After all errors have been corrected, replace the existing 'File with Errors' by re-uploading the corrected file.

Error Messages for Score Sheets

Error Description	Error Message	Details/Instructions
Invalid Score Sheet Version	"Invalid HTC Self-Scoring Worksheet & Deferred Checklist Version. Please download the correct version from the Quick Link on this Checklist Item, enter your project data then re-upload your HTC Self-Scoring Worksheet & Deferred Checklist."	The Portal restricts which versions of the Score Sheet will be accepted, the version you uploaded is not valid. Please click on the Quick Link to download the most current version of the Score Sheet. Re-enter your data and replace the existing 'File with Errors' by re-uploading the corrected Score Sheet.
Invalid/Missing D# (Development Number)	"The D# in your HTC Self-Scoring Worksheet & Deferred Checklist does not match the D# on the Project in the Portal. Please correct and re-upload your HTC Self-Scoring Worksheet & Deferred Checklist."	Your project has been assigned a D#, which can be found in the Project Detail section of your project. This number must be entered on your Score Sheet, prior to uploading. Please enter this D# on the Score Sheet and replace the existing File with Errors by re-uploading the corrected file.
Invalid/Missing M# (Project Number)	"The M# in your HTC Self-Scoring Worksheet & Deferred Checklist does not contain your primary M# from the Project in the Portal. Please	Your project has been automatically assigned two Project Numbers (M#), which can be found in the Project Detail section of your project. The Project # (M#) must be entered on your Score Sheet, prior to

| | correct and re-upload your HTC Self-Scoring Worksheet & Deferred Checklist." | uploading.

Please enter this M# on the Score Sheet and replace the existing File with Errors by re-uploading the corrected file. |
|---|---|---|
| General Errors | "Your HTC Self-Scoring Worksheet & Deferred Checklist contains errors. Please resolve all errors and re-upload your HTC Self-Scoring Worksheet & Deferred Checklist." | Your Workbook contains errors, please re-open your Score Sheet and click 'save' and correct all errors.

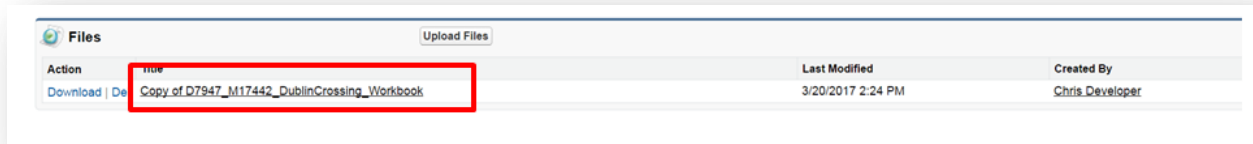After all errors have been corrected, replace the existing File with Errors by re-uploading the corrected file. |
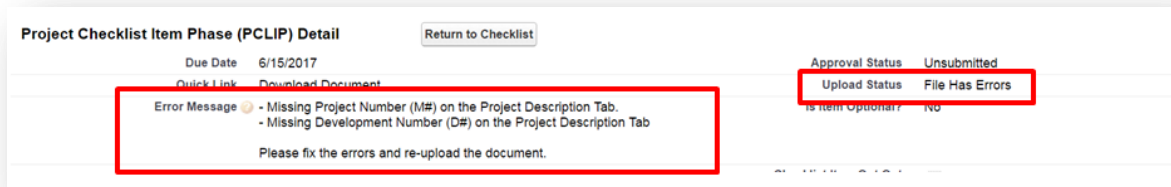
7.21   Scroll down and Click on the Title Hyperlink.

7.22   Click 'Upload New Version.'
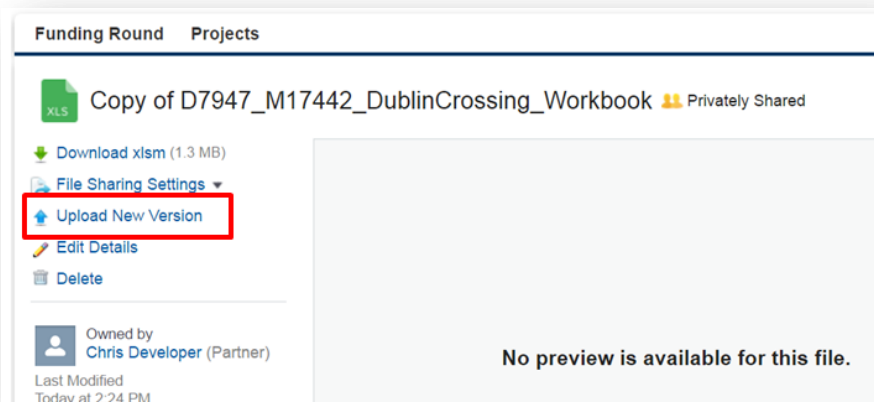
7.23   (1) Click 'Choose File', (2) Identify what changed, (3) locate the new file, and (4) Click 'Upload New Version'
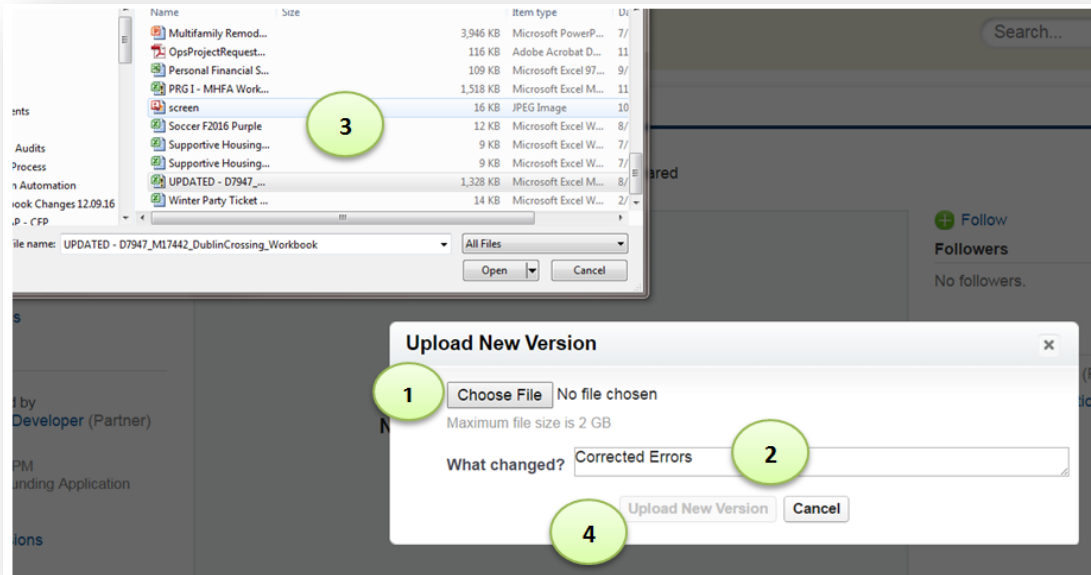
7.24   Manage Existing Uploaded Documents: From the 'Project Checklist Item Phase Detail' Page, if a file is uploaded, you have the following Actions available:

    a.   Preview – allows you to view many files within the browser, without having to download (documents such as .xl, .xls, and .xlsm are not viewable and must be downloaded)

    b.   Download – allows you to download the file to your computer. If you make changes and want to update the file, you must re-upload a new version (see instructions above)

    c.   Del – allows you to permanently delete the existing file

7.25   From the 'Files Management' Page, if a file is uploaded, you have the following Actions available (click on the file
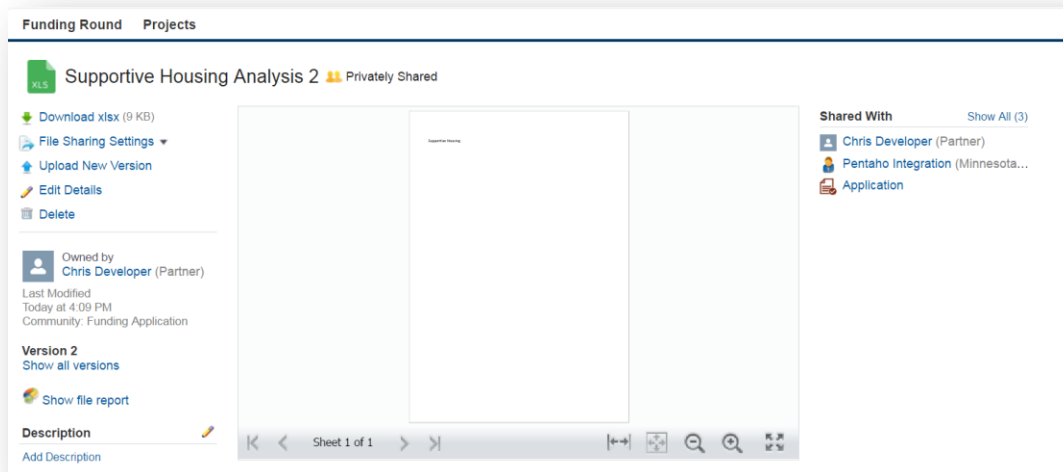
      a.   Download – allows you to download the file to your computer. If you make changes and want to update the file, you must re-upload a new version (see instructions above)

      b.   File Sharing Settings – Do NOT change

      c.   Upload New Version (see instructions above) – allows you to upload a new version of this file

      d.   Edit Details – allows you to change the name of file

      e.   Delete – allows you to permanently delete the existing file

      f.   Show all Versions – allows you to view the history of all versions that have been uploaded.

      g.   Show File Report – allows you to see detailed information about the document downloads, posts, comment, likes, shares, and links (informational purposes only)

      h.   Shared with – allows you to see what users are able to view your files

7.26   To return to the checklist item from the file upload page, Click the Phase name, such as 'Intent to Apply' or 'Application' link (this will depend on what Phase you are in)
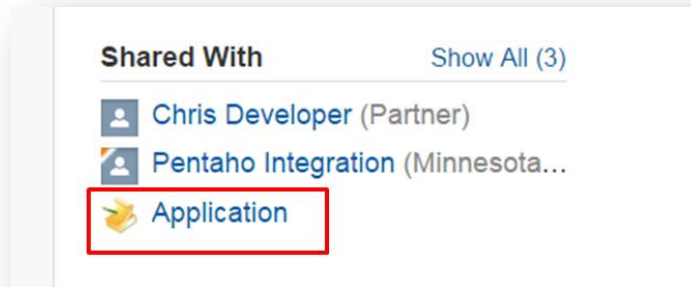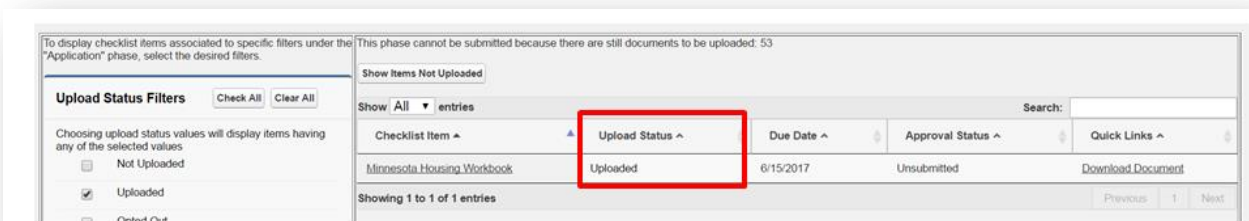

7.27   Verify the document has been updated by the date AND/OR by reviewing the document.

7.28   Verify the checklist item no longer has errors.

NOTE: The checklist item will show status 'Uploaded' immediately, but the system may take up to 15 minutes to identify errors and change the status to 'File Has Errors.'

Chapter 8 – How to Submit your Checklist

IMPORTANT: Intent to Apply and your Application checklists must be submitted separately; therefore, please follow the instructions and complete these steps for **both checklists.**

8.01   To see what checklist items still need documentation, click the 'Show Items Not Uploaded,' which will filter only the items with the upload status of 'Not Uploaded' OR 'File Has Errors' AND provide you with a running total that will decrease as you upload or opt out of checklist items.
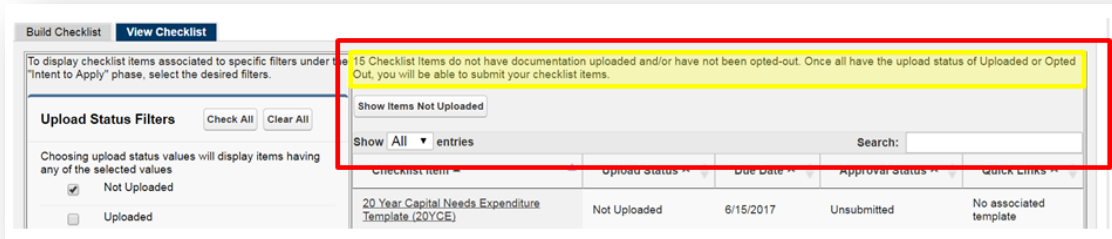
8.02   Repeat the steps above until all checklist items have the status of 'Uploaded' or 'Opted Out' (if applicable).

8.03   Once all checklist items have an upload status of 'Uploaded' or 'Opted Out', the 'Submit for Review' button will automatically be enabled.

8.04   If you are ready to submit your checklist, click the 'Submit for Review' button.
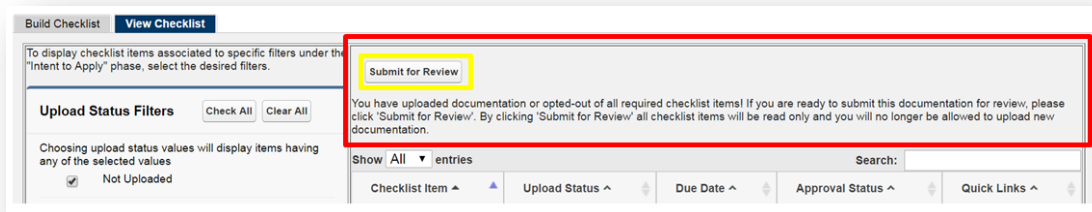
IMPORTANT: Once you submit your checklist documentation for review, you will no longer be able to upload new or edit existing documentation. If the deadline has not expired, you may contact Minnesota Housing staff to unlock your checklist to allow you to upload new or edit existing documentation.

8.05   To complete your submission, select the 'Continue' button.
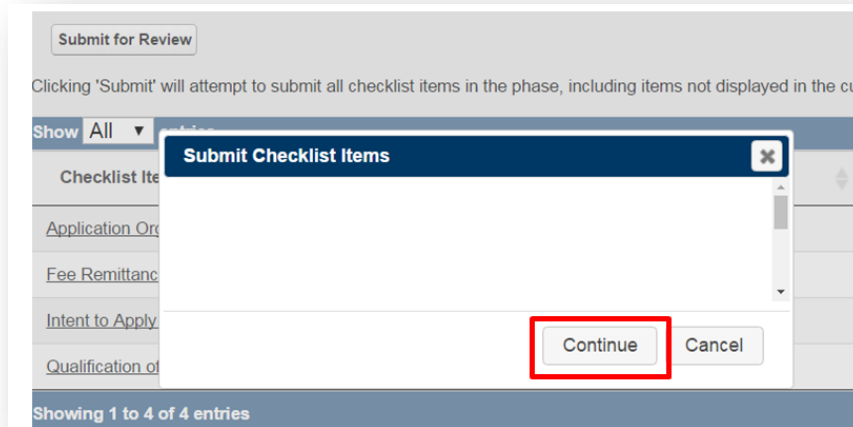
8.06   To ensure your checklist has been submitted, verify the following:

a.   The 'Approval Status' of your checklist items all are now 'Submitted.'

b.   The 'Phase Status' field is now set to 'Submitted.'

c. You should only be able to see the 'View Checklist' tab; the 'Build Checklist' tab should be hidden.
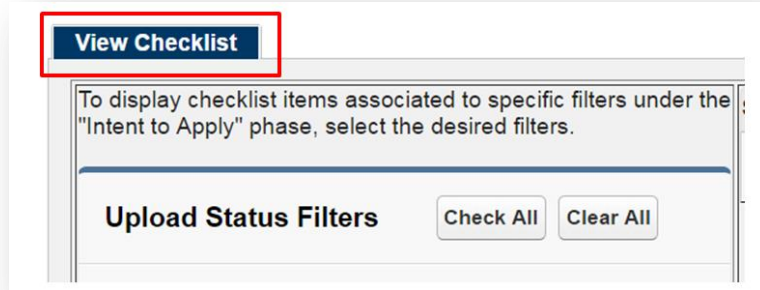
Congratulations, you have submitted your Project Application!

Chapter 9 – How to Delete Accounts and/or Disable Users

9.01   You may submit a request to Minnesota Housing to have a User Account deleted or the USER's permissions altered if:

- A user at one time was affiliated with a project of your organization but now no longer works at your organization or is no longer is affiliated with the project, **OR**
- A circumstance has arisen where you no longer want a user to have access to a particular project

Please submit your request to [mhfa.app@state.mn.us.](mailto:mhfa.app@state.mn.us)

Appendix A: System Requirements and Configuration Recommendations

Customer Portal Supported Browsers
Microsoft
Edge
I.E. 9, 10, 11
Setting Information: (Link to More Information)

Mozilla Firefox, most recent stable version
Setting Information: (Link to More Information)

Google Chrome, most recent stable version
Apple Safari Versions 9.x 9.x and 10x on Mac OS X

Recommendations and Requirements for All Browsers
For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that don't support TLS 1.1 or TLS 1.2 won't be able to access Customer Portal after we deactivate TLS 1.0. Deactivation has already occurred in sandbox orgs and concludes with production orgs on March 4, 2017.

The minimum screen resolution required to support all Customer Portal features is 1024 x 768. Lower screen resolutions don't always properly display Customer Portal features such as Report Builder and Page Layout Editor.

For Mac OS users on Apple Safari or Chrome, make sure the system setting Show scroll bars is set to Always.

Appendix B: User Tips and Preferences

In the Upper Right Hand corner of the browser, click on your Name and click 'My Settings'

The following options are available for you to personalize your account. No changes are required for you to use the portal and it is recommended that you **do not** make changes.

Location Settings – select your language, locale, and time zone (if different then default from what we setup for you)
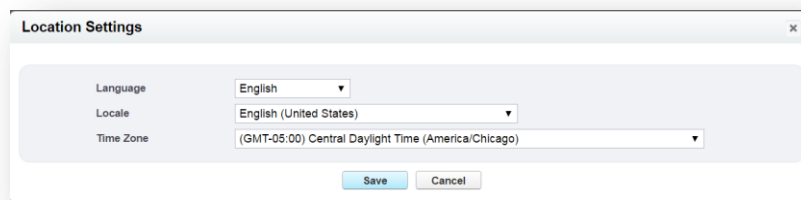
Security Settings – allows you to update your password. Please do NOT change your 'User Name'
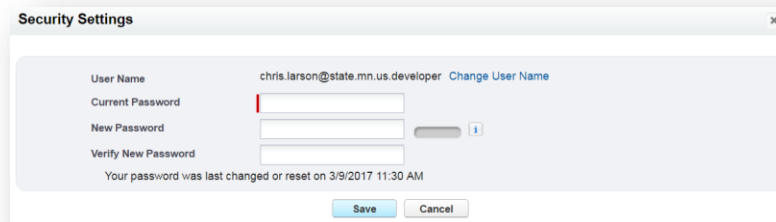
Email Settings – allows you to start/stop receiving email updates from the portal
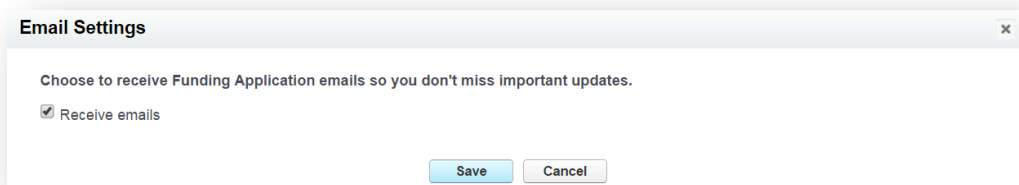
Activity Reminders – allows you to manage alerts and updates while logged into the portal

Approved Connections – No changes can be made (you should see the following message)

Appendix C: Portal Terms and Definitions

Term	Definition
Characteristics	Characteristics are project attributes used to customize checklists. Examples of characteristics are: HTC 4%, HTC 9%, supportive housing, new construction, or rehabilitation. During the Pre-Application, Intent to Apply, and Application phases Developers and Processing Agents will select the project characteristics. During Due Diligence, Carryover, and 8609 phases loan processors will select project characteristics.
Development Team	Development team is the same as the Development Team on the Workbook. These are not necessarily Portal account holders.
Funding Round	A funding round is an application round created in the portal to accept and process documents within a given time period. For example, 2017 RFP/2018 HTC Round 1 is a funding round. When a funding round opens developers and processing agents will go to set up a project in the portal. A project needs to be associated with a funding round to request funds.
Phase	Within a funding round are phases. Phases capture a self-contained process within the life of a project. Examples of phases are: Pre-Application, Intent to Apply, Application, Due Diligence, 42M, 8609.
Project	A project is an application for funding. It is synonymous with the M#.
Project Team	Members of a Project Team are portal account holders assigned to the project. This includes both internal staff and external team members. 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.
Property	A property is a physical location. It is synonymous with the D#.
User Account	In order to view and work on projects in the Portal you must have a User Account. User accounts for the upcoming RFP are for project sponsors, developers and processing agents. After selection anyone from the Project Team will need to have a user account to work in the portal.

Property - A property is a physical location. It is synonymous with the D#.
Project - A project is an application for funding. It is synonymous with the M#.
User Account - In order to view and work on projects in the Portal you must have a User Account. User accounts for the upcoming RFP are for project sponsors, developers and processing agents. After selection anyone from the Project Team will need to have a user account to work in the portal.