

Quick Links: [Overview](#) | [Access Checklists](#) | [Checklist Features](#) | [Checklist Items](#) | [Manage Files](#) | [Checklist Submission](#) | [Printing](#) | [Questions](#)

Overview

Project checklists are used to collect documentation to support applications for financing from Minnesota Housing. They are also used to collect loan closing and Housing Tax Credit due diligence.

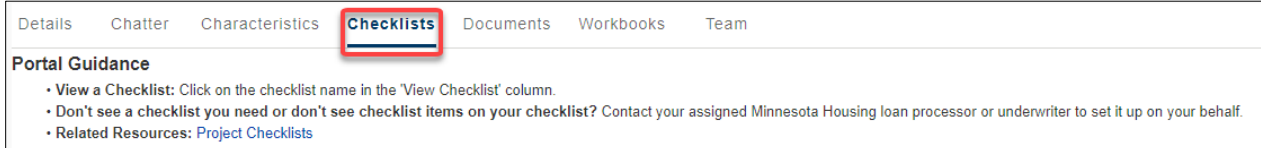
For the Pre-Application, Intent to Apply, and Application checklists, you will need to [setup your project characteristics](#) before working on your customized checklist.

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.

How to Access Project Checklists

To access project checklists:

- Go to the **Checklists** tab on the project page.

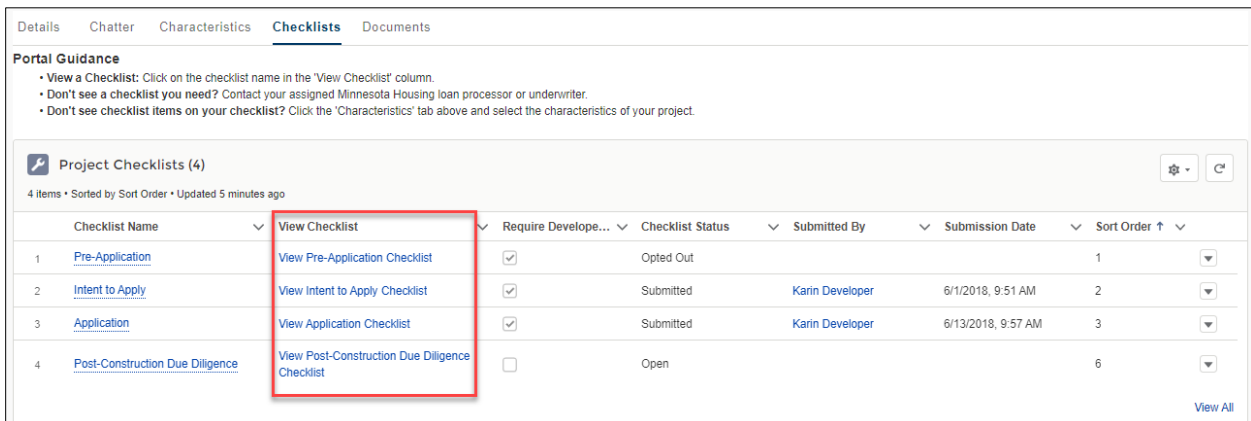


Details Chatter Characteristics **Checklists** Documents Workbooks Team

Portal Guidance

- View a Checklist: Click on the checklist name in the 'View Checklist' column.
- Don't see a checklist you need or don't see checklist items on your checklist? Contact your assigned Minnesota Housing loan processor or underwriter to set it up on your behalf.
- Related Resources: [Project Checklists](#)

- Click on the checklist name in the **View Checklist** column.



Details Chatter Characteristics **Checklists** Documents

Portal Guidance

- View a Checklist: Click on the checklist name in the 'View Checklist' column.
- Don't see a checklist you need? Contact your assigned Minnesota Housing loan processor or underwriter.
- Don't see checklist items on your checklist? Click the 'Characteristics' tab above and select the characteristics of your project.

Project Checklists (4) ⚙️ 🗖️

4 items • Sorted by Sort Order • Updated 5 minutes ago

Checklist Name	View Checklist	Require Develop...	Checklist Status	Submitted By	Submission Date	Sort Order
1 Pre-Application	View Pre-Application Checklist	<input checked="" type="checkbox"/>	Opted Out			1
2 Intent to Apply	View Intent to Apply Checklist	<input checked="" type="checkbox"/>	Submitted	Karin Developer	6/1/2018, 9:51 AM	2
3 Application	View Application Checklist	<input checked="" type="checkbox"/>	Submitted	Karin Developer	6/13/2018, 9:57 AM	3
4 Post-Construction Due Diligence	View Post-Construction Due Diligence Checklist	<input type="checkbox"/>	Open			6

[View All](#)

Checklist Features

The screenshot displays the 'Project and Checklist Details' section at the top, followed by a 'Filter by Characteristics' sidebar on the left and a main table of checklist items. Red circles with numbers 1 through 9 point to specific elements: 1 (Project name), 2 (Submit button), 3 (Filter sidebar), 4 (Search bar), 5 (Checklist item name), 6 (Upload Status), 7 (Stage), 8 (Approval Status), and 9 (File Last Modified).

Project and Checklist Details

Project	KW Test_04.13.22_8.12	Funding Round	2022 RFP/2023 HTC Round 1
Checklist	Application	Checklist Due Date	7/14/2022, 12:00 PM
Checklist Status	Open		
Checklist Description	Based on characteristics of your Project you can custom-build your complete application checklist and upload documents, including scoring documentation.		

Filter by Characteristics (3)

- Proposal Type**
 - 9% Housing Tax Credits and Deferred
 - Deferred Only
- Project Type**
 - Supportive Housing for High Priority Homeless or Other Homeless
 - Workforce Housing
- Construction Type**
 - New Construction
- Other Project Characteristics**
 - Dual Application
 - First Mortgage Request
 - People with Disabilities

Submit (2)

44 checklist item(s) do not have documentation uploaded and/or have not been opted out. Once all checklist items have the upload status of "Uploaded" or "Opted out," you will be able to submit your checklist items.

Show Items Not Uploaded

Show All entries Search: (4)

Checklist Item (5)	Upload Status (6)	Stage (7)	Approval Status (8)	File Last Modified (9)
4% HTC Syndicator/Investor Letter of Intent	Uploaded	Application Submittals	Ready for Review	5/3/2022, 9:46 AM Allison Developer
Affirmative Action Certification	Uploaded	Application Submittals	Ready for Review	5/3/2022, 10:43 AM Allison Developer
BIPOCBE/WBE	Uploaded	Application Submittals	Ready for Review	5/3/2022, 11:02 AM Allison Developer
Bond Test Analysis at Application	Uploaded	Application Submittals	Ready for Review	5/3/2022, 10:51 AM Allison Developer
Certification of Environmental Issues	Uploaded	Application Submittals	Ready for Review	5/3/2022, 11:11 AM Allison Developer
Community Development Initiative	Uploaded	Application Submittals	Ready for Review	5/3/2022, 12:47 PM Allison Developer
Compliance with the IRS 10-Year Rule	Uploaded	Application Submittals	Ready for Review	5/3/2022, 11:14 AM Allison Developer
Construction Cost Estimate - New Construction	Not Uploaded	Application Submittals	Unsubmitted	
Continuum of Care Confirmation	Uploaded	Application Submittals	Ready for Review	5/3/2022, 10:56 AM Allison Developer

Filter by Upload Status (Check All Clear All)

Each checklist includes the following features:

- 1. Project and Checklist Details.** See the name of the project you are working on, the funding round, a checklist description, and any applicable due dates.
- 2. Checklist Submission.** For checklists that require a formal submission process (think: Application, Carryover, or 8609) you can see how many checklist items still need documentation uploaded or you need to opt out of. Click **Show Items Not Uploaded** to reduce your list. Once all checklist items have documentation uploaded or have an upload status of 'opted out', click **Submit** for Minnesota Housing to receive your application. Don't see this feature? That means staff will review uploaded documents on a rolling basis. No need to hit submit!
- 3. Filter your checklist.** Each checklist has a list of available filter options in the left-hand column of the screen. Want to remove items you opted out of or that aren't applicable? Use the Filter by Upload Status option.
- 4. Search.** Looking for a specific checklist item? Use the search feature to jump to it quickly by typing the name of the item.
- 5. Checklist items.** Click on the name of a checklist item to upload documentation, access links to forms or resources, and view help text.

6. **Upload Status.** Not sure if you've uploaded a document yet? Check the upload status.
7. **Stage.** The stage indicates when in the project's lifecycle the item is collected. Example stages include Application Submittals, Due Diligence Submittals, In Closing, or Construction Close-out.
8. **Approval Status.** Check to see if you've submitted your checklist (if a formal submission is required) or if Minnesota Housing staff have marked the checklist item as Not Applicable, Changes Required, Approved or Pending Closer Review.
9. **File Last Modified.** See who last updated files associated with this checklist item and when it was modified.

Checklist Item Features

The screenshot displays a web interface for a 'Project Checklist Item' titled 'Dual Multifamily Workbook'. The interface includes a header with a 'Follow' button and a 'Return to Checklist' button. Below the header, there are fields for 'Project' (KW Test_04.13.22_8.12), 'Return to Checklist' (View Application Checklist), 'Upload Status' (Not Uploaded), and 'Approval Status' (Unsubmitted). A 'Files (0)' section contains an 'Add Files' button and an 'Upload Files' button with a note 'Or drop files'. A central table lists item details with 14 numbered callouts: 1 (Title), 2 (Return to Checklist), 3 (Files), 4 (Post), 5 (Approval Status), 6 (Required File Extension), 7 (Upload Status), 8 (Is Item Optional?), 9 (Quick Link), 10 (Maximum Number of Attachments), 11 (Checklist Item Opt Out), 12 (Error Message), 13 (Project Checklist Item), and 14 (Help Text). A 'Collaborate here!' section is on the right, and a footer contains help text.

Each checklist item includes the following features:

1. **Checklist Item Details.** Shows the name of the checklist item, upload status, and approval status.

2. **Return to Checklist button.** Click the Return to Checklist button to return to the checklist.
3. **Files.** Upload files related to this checklist item. See the [Managing Files](#) guide for details.
4. **Approval Status.** Displays the checklist item approval status. Status options include Unsubmitted, Submitted, Ready for Review, Approved, Changes Required, or Pending Closer Review.
5. **Chatter.** Use Chatter to communicate. Direct messages to a recipient by @mentioning them in the post. See the [How to Use Chatter](#) guide for more details.
6. **Required File Extension.** Displays the required file extension for files uploaded to the checklist item. Example file extensions include .xism or .pdf.
7. **Upload Status.** Displays if one or more files is uploaded to the checklist item. Status options include Not Uploaded, Uploaded, Opted Out, or Not Applicable.
8. **Is Item Optional?** Displays if the checklist item is required based on the characteristics of the project or optional. If the file is optional, you can opt out of it.
9. **Quick Links.** Click the link to download forms, view related websites, or access resources.
10. **Maximum Number of Attachments.** Displays the maximum number of attachments you can upload to the checklist item.
11. **Checklist Item Opt Out.** Checklist item not apply to your project? Check the 'Checklist item Opt Out' field by double-clicking on the box or clicking on the pencil icon.



12. **Error Message.** Refer to this field for additional detail about any error messages after uploading files.
13. **Help Text.** Refer to the Help Text section at the bottom of the page for additional guidance about this checklist item. In some cases, related links are displayed in the help text.

Manage Files

See the [Managing Files](#) guide for instructions on how to upload a file, upload a new version of a file, and get tips for common file upload issues.

Checklist Submission

For checklists that require a formal submission process (think: Application, Carryover, or 8609) you can see how many checklist items still need documentation uploaded or you need to opt out of if the item is optional. Click **Show Items Not Uploaded** to reduce your list.

Once all checklist items have documentation uploaded or have an upload status of ‘opted out,’ click the **Submit** button.



TIP: After you click submit, the system will check for errors. Refer to the table below for sample errors and corrective actions.

Table 1: Sample Errors and Corrective Actions

Error	Action to Take
A checklist item has an upload status of ‘File has Errors.’	Click into the checklist item to review the error message. Correct the error in the source file and reupload. Allow up to 15 minutes for the system to recheck the file and clear the error message.
One or more checklist items is missing files	Upload files to the checklist items or mark optional checklist items as ‘Opted out.’
The submission deadline has expired	Contact mhfa.app@state.mn.us .

If no errors are found, a pop-up window will ask you to confirm all materials with a signature block are signed. Click **Continue** to submit the checklist.

IMPORTANT: Once you submit your checklist 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 at mhfa.app@state.mn.us to unlock your checklist to allow you to upload new or edit existing documentation.

To make sure your checklist was submitted, verify the following:

- The approval stat of you checklist items all show 'Submitted'
- The Checklist Status field shows Submitted
- You no longer can see the Submit button on the checklist
- You receive an email confirming the submission

Congratulations, you have submitted your checklist successfully!

Printing

There is not currently a way to export the checklist to a PDF or excel file. To print the checklist, use the browser's print function.

Tips for printing

- Highlight all the fields on the page prior to printing. Use a keyboard shortcut to select all:
 - Windows & Linux: Ctrl + a
 - Mac: ⌘ + a
- Select the landscape page layout.

Not sure how to print from Chrome? Check out [this guide](#).

Questions

For technical questions, contact mhfa.app@state.mn.us.