Multifamily Customer Portal Release Notes – March 2020

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These release notes summarize changes made to the Multifamily Customer Portal as part of the March 2020 release. They are broken into five sections: Overview, New Features, Improvements, Fixes, and Questions. Jump to the sections by clicking on the quick links above.

Overview

The Multifamily Customer Portal has a new interface and a more modern look and feel! With this release you can access chatter notifications more easily, drag and drop files, and more. We rolled out a simpler way to set up your checklists. Rather than clicking into each checklist to identify your project characteristics, you can set it up or make updates in one spot.

We also made structural changes behind the scenes to support new features we plan to roll out in 2020 including a new way to manage project timelines and tasks. Don't worry; we won't need to take the Portal offline again to release these features.

The recommended browser for working in the upgraded Multifamily Customer Portal is Google Chrome. Download Google Chrome for free. Learn more about supported browsers

New Features

System-wide

- **Upgraded User Interface.** Throughout the Portal we've updated the look and feel of pages. This includes adding more color, improving page layouts, and adding some new features.
- **Home Page.** After logging in, you are brought to a new homepage. Here you can access funding rounds, projects, and Portal user guides.
- **Chatter Notifications and Notification Bell.** Quickly see chatter messages you've received since you last logged in by clicking on the notification bell on your navigation bar.
- **Drag and Drop Files.** Drag files from your desktop and drop them onto the page rather uploading each file. NOTE: Feature is unavailable when uploading files to Project Workbooks.
- **On-screen Guidance.** Get tips and access topic specific user guides on the page you are viewing rather than navigating to a separate space.
- **My Account.** See all of the contacts in your organization that have access to your organization's Portal account.
- **My Profile.** Customize your profile by adding a profile picture and telling us a little about yourself. NOTE: Only individuals in your account and Minnesota Housing staff can see your profile picture.

Projects

- **Characteristics tab.** We rolled out a simpler way to set up your checklists. Rather than clicking into each checklist to identify your project characteristics, you can set it up or make updates in one spot on the new 'Characteristics' tab.
- **Chatter about Projects.** We've added chatter to the project-level. Have a general project update? Post them to the Chatter tab. Chatter is still available on checklist items and documents.

Improvements

Projects

- **Rebranded 'Phase Checklists' to 'Project Checklists.'** We heard the term 'phase checklists' was confusing. Now checklists are just called what they are – checklists!
- **Checklist Build Tab.** We removed the 'Build' tab from project checklists. Go to the 'Characteristics' tab on the project page instead.
- **Download Workbook Files More Easily.** Within the Project Workbooks section, we added a 'File Link' and 'Download' option to remove a few extra clicks.
- **New 'Pending Closer Review' Checklist Item Status.** Some documents are required earlier on in the due diligence process, but are not approved until the closing file transitions to our closing team. We've added a new checklist item approval status to identify items that fall into this category.

Fixes

Projects

- **Removed Sub-Phases and Related Due Dates.** We heard from a number of customers and staff that sub-phases and associated checklist item due dates were confusing. These features were intended to help prioritize checklist items to work on to achieve a desired closing date, but they didn't always make sense for certain projects. The due dates tied to sub-phases were not aligning with project phases and milestones. Changing a project's sub-phases also created issues behind the scenes. **We have removed these features and are working on a different way to manage project timelines.** Thanks for your feedback!
- **Checklist Submission Due Date Has Passed.** For some checklists (such as the Pre- and Post-Construction Due Diligence checklists) we removed a locking feature that prevents additional uploads after a certain date has passed. This was causing unnecessary frustration and keeping customers from uploading files. **NOTE:** Checklists with a hard deadline (such as the application due date for the consolidated RFP) will continue to have this feature.

Questions

Have a question or feedback about this release? Contact mhfa.app@state.mn.us