Minnesota Housing

Multifamily Customer Portal User Guide

Scoring Wizard

August 2023

Table of Contents

Overview

The Scoring Wizard allows applicants to complete the self-scoring process within the Multifamily Customer Portal (Portal).

The Scoring Wizard:

- **Guides the user through the scoring process.** When you enter information about your project, the Scoring Wizard identifies the points you are eligible for based on the information provided.
- **Create test scenarios.** Not sure how claiming certain criteria will impact your score? You can create up to four scenarios in the Scoring Wizard and then submit the final version when you are ready.
- **Auto calculates formulas in real-time to reduce complexity and errors.** Not sure which value to include in the denominator? The Scoring Wizard does the calculations for you.
- **Provides easy access to scoring resources.** Links to the scoring guide and other resources are available throughout the Scoring Wizard.
- **Generates a PDF scoring report.** You can create a PDF of the points you claimed for your records.

Launch the Scoring Wizard

To launch the Scoring Wizard, log into the Portal and either create a new project or select an existing project. Refer the How to Log In and How to Apply for Funding guides for more information about these steps.

Once you have navigated to a project, click on the **Scoring Wizard button** in the upper right corner of the page. A new screen will pop up on the page.

Navigation and Assistance

Throughout the Scoring Wizard features are available to assist with navigation or provide additional information. Features include:

- **Buttons.** Buttons are available throughout the Scoring Wizard to allow you to move from page to page or confirm an action. Examples include Return to Project, Save and Close, Save and Next, and Open Selected Scoresheet
- **Expand or Collapse Content.** On many pages you will be able to expand or collapse content, including instructions and the legal disclaimer, by using the toggle button at the top of the page. Click on the white circle within the toggle to hide information.

- **Path.** After setting up a scoresheet, you will see a path at the top of the Scoring Wizard. Clicking on a header within the path will allow you to jump from page to page. NOTE: Some pages, such as the Scoresheet Setup and Minimum Thresholds, will require you to respond to all questions prior to navigating to the next page or exiting the Scoring Wizard.

- **Links.** You can find links to guides and websites throughout the Scoring Wizard. When you hover your mouse over a link, the link text will be underlined.
- **Error Messages.** Error messages flagging required questions or validation errors appear in red below the related question. In some instances, a pop-up warning will appear.

Terms and Conditions

The first time you launch the Scoring Wizard for a project, you will be required to review the terms and conditions.
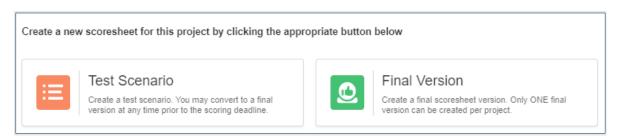
If you select **Decline,** you will not be able to use the Scoring Wizard.

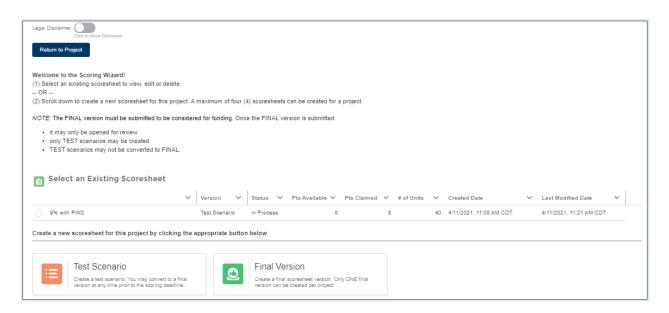If you select **Accept,** you will be able to create a new scoresheet.

Upon accepting the Terms and Conditions, you will be prompted to create either a test scenario or a final version of the scoresheet. You may create up to four scoresheets including three test scenarios and one final version. Only the final version will be reviewed by Minnesota Housing upon submission.
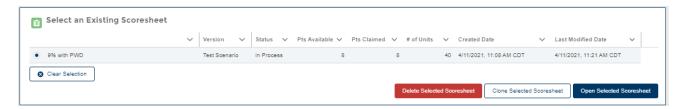

You will be brought to the Scoresheet Setup page after you select either Test Scenario or Final Version. Refer to the Scoresheet Setup section of this guide for additional details.

Managing Scoresheet Versions

After at least one scoresheet version is created, the next time you launch the Scoring Wizard you will be prompted to **select an existing scoresheet or create a new one**.

Selecting an existing scoresheet will provide you with the following additional options:

- **Clear Selection.** Clicking this button allows you to unselect the scoresheet you selected.
- **Delete Selected Scoresheet.** Clicking this button allows you to delete an existing scoresheet. NOTE: you will be asked to confirm this action before the scoresheet is deleted.
- **Clone Selected Scoresheet.** Clicking this button allows you to make an exact copy of an existing scoresheet. This can only be done if you have three or fewer existing scoresheets.
- **Open Selected Scoresheet.** Clicking this button allows you to open and edit an existing scoresheet.

Scoresheet Setup

On the Scoresheet Setup page, you will:

- **Enter or edit your scoresheet description.**
- **Manage the scoresheet version.** This can be changed at any time.
- **Select your project location.** This determines which questions you see and is used in point calculations.

- **Identify whether your project is a Scattered site property.** Refer to the Self-Scoring Worksheet and Scoring Guide for additional details.
- **Enter your Unacceptable Practice points** if known. Enter 0 if this question does not apply.
- **Enter your Total Units by Size.** The values entered in this grid are used in multiple calculations throughout the Scoring Wizard. These values can be changed at any time, but any changes may result in validation errors that will be flagged throughout the Scoring Wizard. Validation errors must be resolved prior to submitting your scoresheet.

Total Units by Size									
Unit Description	SRO	Efficiency	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	Total Units
Enter the total number of units for each size of unit	0	0	0	0	0	0	0	0	0

Click the **Save & Next** button to proceed to Minimum Threshold Requirements.

Minimum Threshold Requirements

On the Minimum Threshold Requirements page, you will:

- **Enter your Assisted Units by Size.** No units are required in this grid; however, multiple point calculations are based on the number of units entered. These values can be changed at any time. Changes may result in validation errors that must be addressed.

Assisted Units by Size									
Unit Description	SRO	Efficiency	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	Total Units
Enter the number of Assisted Units for each unit size.	0	0	12 (10 max)	15 (10 max)	25 (20 max)	0	0	0	52

- **If prompted, respond to the Preferences questions.** Preference questions are not required in all funding rounds.
- **Respond to Deeper Rent Targeting questions.**
  - If you select **Yes**, you will not be prompted to review the Deeper Rent Targeting Units by Size grid. Your response indicates you have met the minimum threshold.
  - If you select **No**, the Deeper Rent Targeting Units by Size grid will display with the minimum number of units that will be restricted.
  - If you select **Do not know,** you will not be prompted to review the Deeper Rent Targeting Units by Size grid.
- **Respond to the Minimum Threshold Requirements questions (if appliable within the funding round).**
  - The options available in this section are determined by your project location.

- Select **No** if you are NOT applying for 9% housing tax credits (HTCs). No additional questions will be displayed when No is selected. See the Self-Scoring Worksheet and Scoring Guide for more information.
- If you select **Yes**, additional questions will be displayed. You must select Yes to at least one of the additional questions displayed to meet the minimum threshold requirements. See the Self-Scoring Worksheet and Scoring Guide for more information.

Click the **Save & Next** button to proceed to Greatest Need Tenant Targeting. Click the **Save & Close** button if you wish to exit the Scoring Wizard and complete scoring at another time.

Greatest Need Tenant Targeting

On the Greatest Need Tenant Targeting page, you will:

- **Respond to all questions displayed.** Based on your response, additional questions may display or become hidden.
- **Enter all applicable data.** Based on your response to questions, you may be prompted to provide additional data about your project. See the Self-Scoring Worksheet and Scoring Guide for more information.

Click the **Save & Next** button to proceed to Serves Lowest Income for Long Durations. Click the **Save & Close** button if you wish to exit the Scoring Wizard and complete scoring at another time.

Serves Lowest Income for Long Durations

On the Serves Lowest Income for Long Durations page, you will:

- **Respond to all questions displayed.** Based on your response, additional questions may display or become hidden.
- **Enter all applicable data.** Based on your response to questions, you may be prompted to provide additional data about your project. For example, if you indicate that your project meets a preservation threshold, you will be asked which preservation tier your project meets. See the Self-Scoring Worksheet and Scoring Guide for more information.

Click the **Save & Next** button to proceed to Supporting Community and Economic Development and Geographic Choice. Click the **Save & Close** button if you wish to exit the Scoring Wizard and complete scoring at another time.

Supporting Community and Economic Development and Geographic Choice

On the Supporting Community and Economic Development and Geographic Choice page, you will:

- **Use the links to Minnesota Housing's Community Profiles and Walk Score to complete the Geographic Choice section.** See the Self-Scoring Worksheet and Scoring Guide for more information.
- **Respond to all questions displayed.** All questions on this page are required.

Click the **Save & Next** button to proceed to Efficient Use of Scarce Resources and Leverage. Click the **Save & Close** button if you wish to exit the Scoring Wizard and complete scoring at another time.

Efficient Use of Scarce Resources and Leverage

On the Efficient Use of Scarce Resources and Leverage page, you will:

- **Respond to all questions displayed.** Based on your response, additional questions may display or become hidden.
- **Enter all applicable data.** See the Self-Scoring Worksheet and Scoring Guide for more information.

Click the **Save & Next** button to proceed to Building Characteristics. Click the **Save & Close** button if you wish to exit the Scoring Wizard and complete scoring at another time.

Building Characteristics

On the Building Characteristics page, you will:

- **Respond to all questions displayed.** All questions on this page are required.
- **Enter all applicable data.** See the Self-Scoring Worksheet and Scoring Guide for more information.

Before proceeding to the Claim Points page, Minnesota Housing recommends that you review all the pages to verify data has been entered correctly and all validation errors have been cleared.

Click the **Save & Next** button to proceed to Claim Points. Click the **Save & Close** button if you wish to exit the Scoring Wizard and complete scoring at another time.
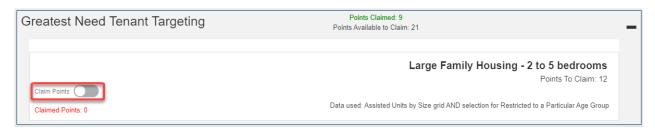
Claim Points

On the Claim Points page, you will:

- Click on the + symbol within each category to view all questions and awarded points. This will allow you to see how points are calculated within the category.
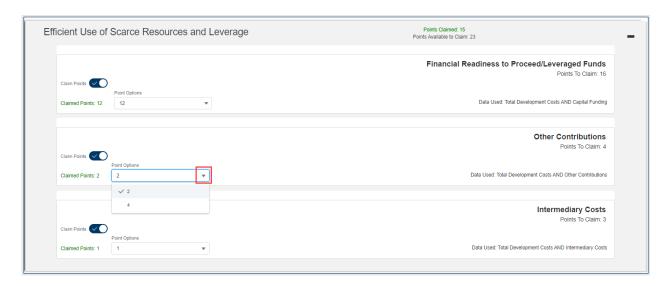

- **Deselect any points you do NOT want to claim.** Within each category, use the Claim Points toggle button to indicate you do NOT want to claim points for that category. Based on the project information provided, the Scoring Wizard claims all points you are eligible for by default.

  - Example of points no longer claimed:

- **Elect fewer points for Efficient Use of Scarce Resources and Leverage (if desired).** You can elect fewer points for questions within the Efficient Use of Scarce Resources and Leverage Scoring category.
  - Click the dropdown arrow to see available point options.
  - Click on the amount of points you want to claim. The green text to the right of the point options dropdown will update to reflect your selection.

Review Data Used on the question card to understand how points were determined. For each scoring question, you can see the source data that is used to calculate the points. To adjust points, navigate back to the questions and update the source data accordingly. Return to the Claim Points page after adjustments.

Review Total Points Claimed and Total Points Available to Claim. This is visible at the top of the page above the scoring categories.

Click the **Save & Next** button to proceed to Review and Report. Click the **Save & Close** button if you wish to exit the Scoring Wizard and complete scoring at another time.

Review and Report

Prior to submitting your scoresheet, review the information displayed on the Review and Report tab to validate it is accurate.

If your scoresheet is marked as **Test Scenario**, you will have the following options at the bottom of the screen:
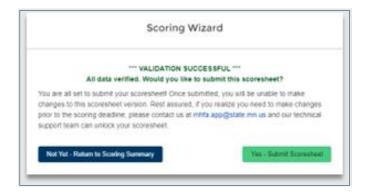

- **Print to PDF**. When you click this button, it generates a PDF version of your Scoring Review Report.
- **Verify Only.** This button runs the validation rules for your scoresheet data entry and claimed points. Fix any data issues and run this verification tool until all errors are cleared.
- **Save & Close.** Click the Save & Close button if you wish to exit the Scoring Wizard and complete scoring at another time.

If your scoresheet is marked as **Final Version**, you will have the following additional option at the bottom of the screen:

- **Verify & Submit.** The Verify & Submit button performs the same action as the Verify Only button; however, once all errors are cleared it will provide the option to Submit Scoresheet or Return to Scoring Summary

If you are ready to submit, click **Yes – Submit Scoresheet**. You will receive a confirmation message that the scoresheet was successfully submitted. Click **Finish** to exist the Scoring Wizard.

To switch a scoresheet from a Test Version to a Final Version, go to the [Scoresheet Setup](#) page and update the version type.

Submission Details

Keep the following in mind when submitting the final version of your scoresheet.

- **You must submit your scoresheet prior to the deadline**. No late submissions will be accepted. If you submit your scoresheet prior to the deadline and you realize you need to make changes, please contact [mhfa.app@state.mn.us.](mailto:mhfa.app@state.mn.us)
- Once submitted, you will no longer be able to edit your submitted scoresheet. You can still create new, clone, and/or edit existing test scenarios.
- Upload all scoring documentation into the Application checklist. You must submit your Application checklist prior to the deadline.

Questions

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