



Multifamily Customer Portal User Guide

Project Checklists

August 2023

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Overview

This guide describes how to use project checklists in the Multifamily Customer Portal (Portal). 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 credits (HTC) due diligence items.

For Pre-Application and Application checklists, you will need to [set up 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 your assigned loan processor or underwriter if a checklist you need is not currently available.

To work on a project checklist, you will need to log into the Portal. Refer to the [How to Log In](#) guide for instructions.

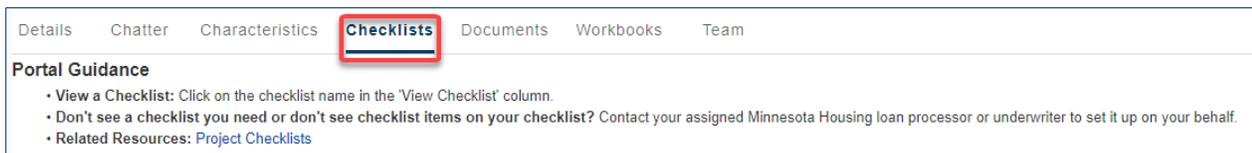
Access Project Checklists

To access a project checklist:

- From the Portal homepage, click **Projects** in the navigation menu.
- Click the name of the project you want to work on.

 **TIP:** Don't see the project name in the list? Click the dropdown arrow next to the list header and change the list to 'All Projects.'

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



The screenshot shows a navigation bar with the following tabs: Details, Chatter, Characteristics, **Checklists** (highlighted with a red box), Documents, Workbooks, and Team. Below the navigation bar is a section titled "Portal Guidance" with the following text:

- **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 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

Checklist features are described in Table 1.

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.

To display checklist items associated to specific filters under the "Application" checklist, select the desired filters.

Submit

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:

Checklist Item	Upload Status	Stage	Approval Status	File Last Modified
4% HTC Syndicator/Investor Letter of Intent	Uploaded	Application Submittals	Ready for Review	5/3/2022, 9:48 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, 10:58 AM Allison Developer

Table 1: Project checklist features

Callout	Feature	Description
1	Project and checklist details	Displays the project you are working on, the funding round, a checklist description, and any applicable due dates.

Callout	Feature	Description
2	Submit button	<p>For checklists that require a formal submission process (such as Application, Carryover, or 8609) you can see how many checklist items still need documents uploaded or which ones are optional items that can be checked as 'opted out' of if they are not applicable to your submission. Click Show Items Not Uploaded to reduce your list. Once all checklist items have documentation uploaded or have an upload status of 'Opted Out' or 'Not Applicable', click Submit. Clicking Submit allows Minnesota Housing to receive your application.</p> <p>Don't see this feature? That means Minnesota Housing staff will review uploaded documents on a rolling basis. No need to click Submit!</p>
3	Filters	<p>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.</p>
4	Search	<p>Use the search feature to jump to an item quickly by typing the name of the item.</p>
5	Checklist items	<p>Click the name of a checklist item to upload documents, access links to forms or resources, and view Help Text.</p>
6	Upload status	<p>Displays if one or more files is(are) uploaded to the checklist item. Status options include Not Uploaded, Uploaded, Opted Out, or Not Applicable.</p>
7	Stage	<p>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.</p>
8	Approval status	<p>Displays the checklist item approval status. Status options include Unsubmitted, Submitted, Ready for Review, Approved, Changes Required, or Pending Closer Review.</p>

Callout	Feature	Description
9	File last modified	See who last updated files associated with this checklist item and when it was modified.

Checklist Item Features

Checklist item features are described in Table 2.

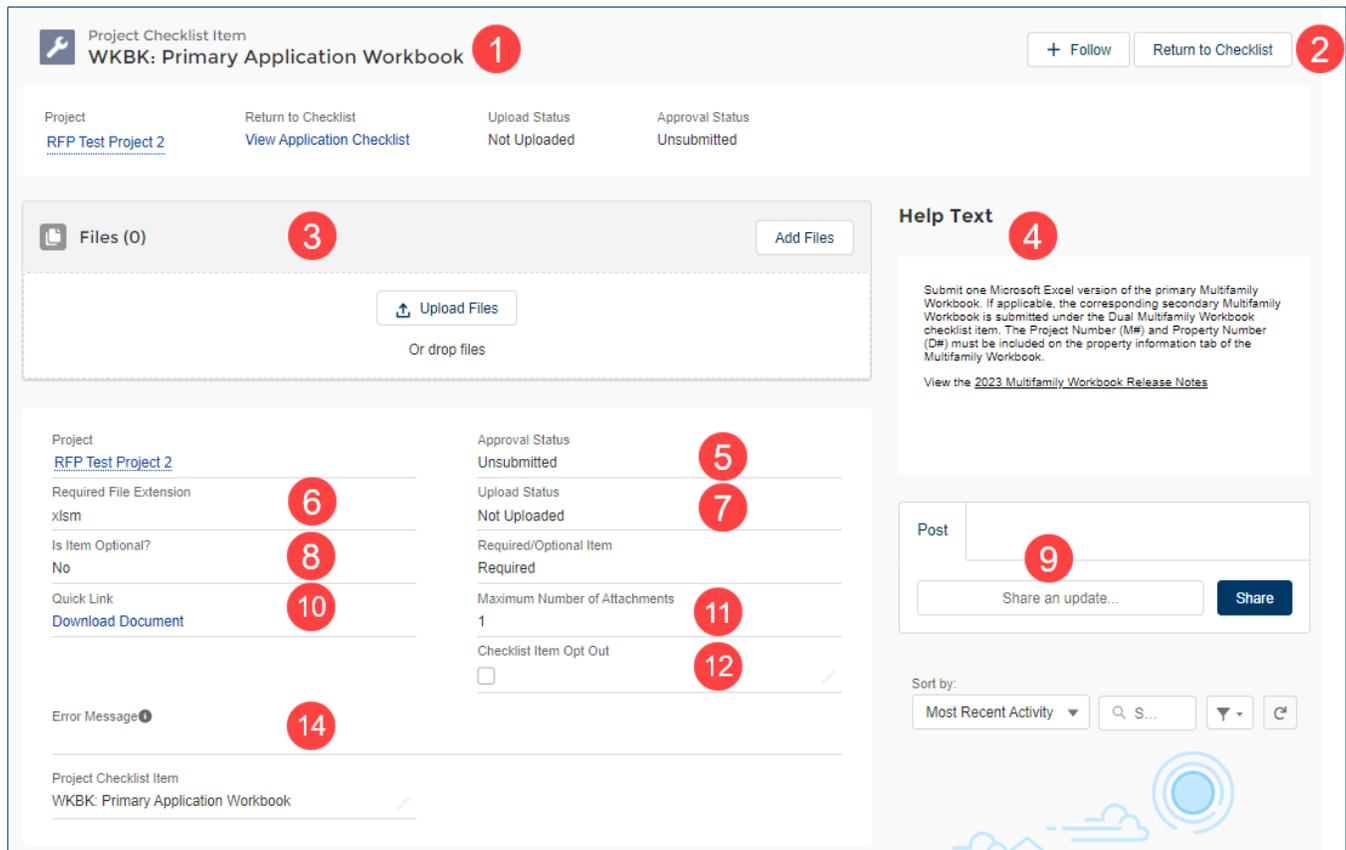


Table 2: Project checklist item features

Callout	Feature	Description
1	Checklist item details	Indicates 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.

Callout	Feature	Description
3	Files	Upload files related to this checklist item. Refer to the Managing Files guide for details.
4	Help Text	Refer to the Help Text for additional guidance about this checklist item. In some cases, related links are displayed in the Help Text.
5	Approval status	Displays the checklist item approval status. Status options include Unsubmitted, Submitted, Ready for Review, Approved, Changes Required, or Pending Closer Review.
6	Required file extension	Displays the required file extension for files uploaded to the checklist item. Example file extensions include .xlsm or .pdf
7	Upload status	Displays if one or more files is(are) 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.
9	Chatter	Use Chatter to communicate. Direct messages to a recipient by @mentioning them in the post. Refer to the How to Use Chatter guide for more details.
10	Quick link	Click the link to download forms, view related websites, or access resources.
11	Maximum number of attachments	Displays the maximum number of attachments you can upload to the checklist item.
12	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. 
13	Error message	Refer to this field for additional detail about any error messages that display after uploading files.

Manage Files

Refer to 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 (such as 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 a status of Uploaded, Opted Out, or Not Applicable, click the **Submit** button.



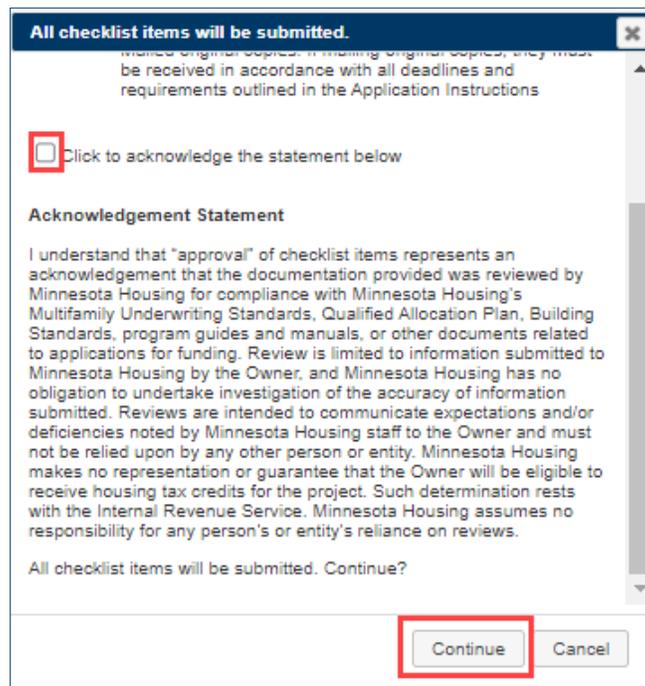
TIP: After you click **Submit**, the system will check for errors. Refer to the table below for sample errors and corrective actions.

Table 3: 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.'

Error	Action to Take
The submission deadline has expired	Contact mhfa.app@state.mn.us .

If no errors are found, a pop-up window will appear. The pop-up will ask you to confirm all materials with a signature block are signed and will request that you accept the acknowledgement statement.



To submit your checklist:

- Click the checkbox to acknowledge the statement.
- Click **Continue**.

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 status of your checklist items all indicate 'Submitted'.
- The Checklist Status field indicates 'Submitted'.

- The **Submit** button is no longer visible on the checklist.
- You receive an email confirming the submission.

Congratulations, you have submitted your checklist successfully!

Printing

Currently, there is not 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 fields on the page prior to printing. Use a keyboard shortcut to select all:
 - Windows and Linux: Ctrl + a
 - **Mac:** ⌘ + a
- Select the landscape page layout.

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

System Support

For system support, contact mhfa.app@state.mn.us.