



# Multifamily Customer Portal User Guide

Scoring Wizard

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April 2025

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## Overview

The Scoring Wizard guides applicants through the self-scoring process within the Multifamily Customer Portal. Specifically, it:

- **Guides the user:** As you enter project information, the Scoring Wizard identifies the points you are eligible for.
- **Creates test scenarios:** You can create up to four scenarios to explore how different criteria affect your score, allowing you to submit a final, optimized version.
- **Auto-calculates formulas:** The Scoring Wizard automatically performs calculations, reducing complexity and the risk of errors.
- **Provides access to resources:** Links to scoring guides and other resources are available throughout the Scoring Wizard.
- **Generates PDF reports:** You can create a PDF report of your claimed points for your records.

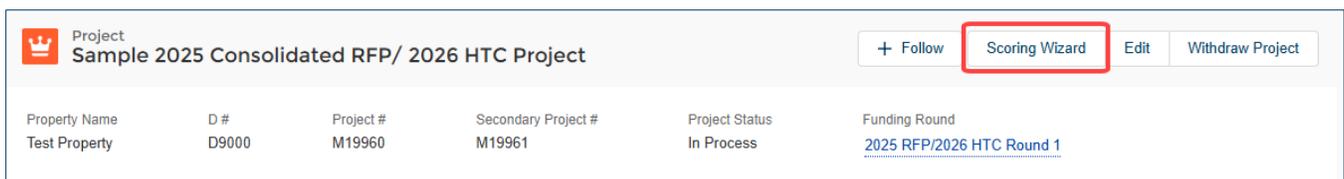
## Launch the Scoring Wizard

To launch the Scoring Wizard:

- Log in to the Portal.
- Create a new project or select an existing one. (For details, see the [How to Log In](#) and [How to Apply for Funding](#) guides.)
- Click the **Scoring Wizard** button in the upper-right corner of the page. A new screen will then appear.

Note: Ensure you have logged in and navigated to your project before proceeding.

Figure 1: Scoring Wizard Button



## Navigating and Getting Help

The Scoring Wizard provides several features to help you navigate and find information.

### Buttons

Buttons throughout the Scoring Wizard allow you to move between pages and confirm actions. Examples include:

- Return to Project
- Save and Close
- Save and Next
- Open Selected Scoresheet

### Show/Hide Instructions and Disclaimer

On many pages, you can show or hide instructions and the legal disclaimer. Use the toggle button at the top of the page. Click the white circle within the toggle to hide information.

Figure 2: Instructions Toggle



### Using the Navigation Path

After setting up a scoresheet, a navigation path appears at the top of the Scoring Wizard. Clicking on a header within the path allows you to jump to that page. However, some pages, such as Scoresheet Setup and Minimum Thresholds, require you to answer all questions before you can navigate away.

Figure 3: Navigation Path



### Accessing External Links

Links to guides and websites are provided throughout the Scoring Wizard. When you hover your mouse over a link, the link text will be underlined.

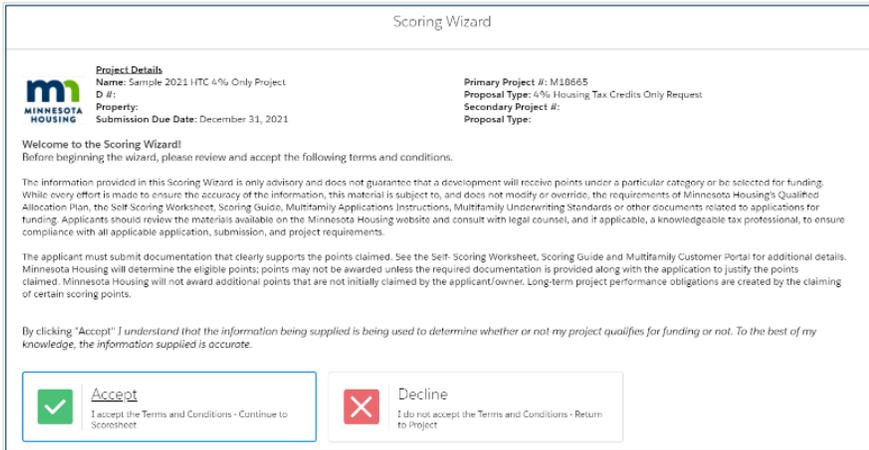
### Understanding Error Messages

Error messages appear in red below the relevant question, flagging required questions or validation errors. In some cases, a pop-up warning will also appear.

# Understanding Terms and Conditions

The first time you launch the Scoring Wizard for a project, you must review and accept the terms and conditions.

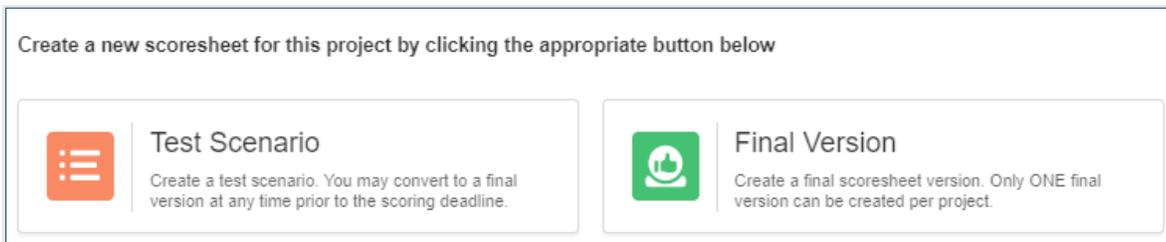
Figure 4: Scoring Wizard Terms and Conditions



- If you select **Decline**, you cannot use the Scoring Wizard.
- If you select **Accept**, you can create a new scoresheet.

After accepting the Terms and Conditions, you will be prompted to create either a test scenario or a final version of the scoresheet. You can 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.

Figure 5: Test Scenario and Final Version Scoresheet Options



You will then be taken to the Scoresheet Setup page. See Setting Up Your Scoresheet for details.

## Managing Scoresheet Versions

After creating at least one scoresheet version, the next time you launch the Scoring Wizard, you can select an existing scoresheet or create a new one.

Figure 6: Manage Scoresheet Versions

Legal Disclaimer  [Click to Show Disclaimer](#)

[Return to Project](#)

Welcome to the Scoring Wizard!  
(1) Select an existing scoresheet to view, edit or delete.  
-- OR --  
(2) Scroll down to create a new scoresheet for this project. A maximum of four (4) scoresheets can be created for a project.

**NOTE: The FINAL version must be submitted to be considered for funding. Once the FINAL version is submitted**

- it may only be opened for review
- only TEST scenarios may be created
- TEST scenarios may not be converted to FINAL.

**Select an Existing Scoresheet**

|                                   | Version       | Status     | Pts Available | Pts Claimed | # of Units | Created Date            | Last Modified Date      |
|-----------------------------------|---------------|------------|---------------|-------------|------------|-------------------------|-------------------------|
| <input type="radio"/> 9% with PWD | Test Scenario | In Process | 8             | 8           | 40         | 4/11/2021, 11:08 AM CDT | 4/11/2021, 11:21 AM CDT |

Create a new scoresheet for this project by clicking the appropriate button below

**Test Scenario**  
Create a test scenario. You may convert to a final version at any time prior to the scoring deadline.

**Final Version**  
Create a final scoresheet version. Only ONE final version can be created per project.

Selecting an existing scoresheet provides the following options:

- **Clearing a Selection.** Clicking the "Clear Selection" button deselects the currently selected scoresheet.
- **Deleting a Scoresheet.** Clicking the "Delete Selected Scoresheet" button deletes the selected scoresheet. You will be asked to confirm this action.
- **Cloning a Scoresheet.** Clicking the "Clone Selected Scoresheet" button creates an exact copy of the selected scoresheet. You can only do this if you have three or fewer existing scoresheets. This is useful for creating new test scenarios based on an existing one.
- **Opening and Editing a Scoresheet.** Clicking the "Open Selected Scoresheet" button opens the selected scoresheet for editing.

## 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. (For details, see the Self-Scoring Worksheet and Scoring Guide.)
- Enter your Unacceptable Practice points (enter 0 if this does not apply).
- Enter your Total Units by Size. These values are used in multiple calculations throughout the Scoring Wizard. You can change these values at any time, but this may result in validation errors that must be resolved before submitting your scoresheet.

Figure 7: Total Units by Size Grid

| 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 | <input type="text" value="0"/> |

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

## Minimum Threshold Requirements

On the Minimum Threshold Requirements page, you will provide information about your project to ensure it meets the necessary criteria.

### Assisted Units

Enter your Assisted Units by Size. You are not required to enter any units in this section. You can change these values at any time, but this may result in validation errors that you will need to address prior to scoresheet submission.

Figure 8: Assisted Units by Size Grid

| 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     | 15     | 25     | 0    | 0    | 0    | 52          |
|  |     |            | 10 max | 10 max | 20 max |      |      |      |             |

### Preferences Questions

If prompted, answer the Preferences questions. These questions are not required for all funding rounds.

### Deeper Rent Targeting

The Scoring Wizard will guide you through questions related to Deeper Rent Targeting. Answering "Yes" to the initial question may bypass the need for further input. If you answer "No", you will be prompted for additional information, and depending on your subsequent responses, you may be prompted to review Deeper Rent Targeting Unit Grids. Refer to the Self-Scoring Worksheet and Scoring Guide for detailed requirements.

### Minimum Threshold Questions

Respond to the Minimum Threshold Requirements questions (if applicable to the current funding round).

- The options displayed in this section depend on your project location.
- Select No if you are NOT applying for 9% housing tax credits (HTCs). Selecting No will prevent any additional questions from being displayed. For more information, see the Self-Scoring Worksheet and Scoring Guide.
- If you select Yes, additional questions will appear. To meet the minimum threshold requirements, you must answer Yes to at least one of these additional questions. For more information, see the Self-Scoring Worksheet and Scoring Guide.

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

## Serving 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 Increasing Housing Choice; Supporting Community and Economic Development. Click the **Save & Close** button if you wish to exit the Scoring Wizard and complete scoring at another time.

## Increasing Housing Choice; Supporting Community and Economic Development

On the Increasing Housing Choice; Supporting Community and Economic Development page, you will:

- **Use the links to Minnesota Housing’s Community Profiles and Walk Score to complete the Increasing Housing 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.

## Claiming Your Points

On the Claim Points page, you will:

- **Click 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.

Figure 9: Scoresheet 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.

Figure 10: Claimed Points

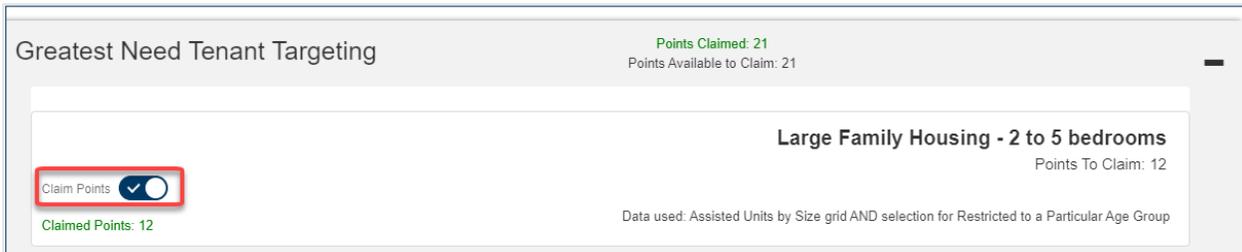


Figure 11: Points No Longer Claimed



- **Select 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.

Figure 12: Select Fewer Points

Efficient Use of Scarce Resources and Leverage

Points Claimed: 15  
Points Available to Claim: 23

**Financial Readiness to Proceed/Leveraged Funds**  
Points To Claim: 16  
Claimed Points: 12  
Point Options: 12  
Data Used: Total Development Costs AND Capital Funding

**Other Contributions**  
Points To Claim: 4  
Claimed Points: 2  
Point Options: 2, 4  
Data Used: Total Development Costs AND Other Contributions

**Intermediary Costs**  
Points To Claim: 3  
Claimed Points: 1  
Point Options: 1  
Data Used: Total Development Costs AND Intermediary Costs

- **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.

Figure 13: Data Used

Greatest Need Tenant Targeting

Points Claimed: 9  
Points Available to Claim: 21

**Large Family Housing - 2 to 5 bedrooms**  
Points To Claim: 12  
Claimed Points: 0

Data used: Assisted Units by Size grid AND selection for Restricted to a Particular Age Group

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

Figure 14: Total Points Claimed

Total Points Claimed: 65  
Total Points Available to Claim: 77

Greatest Need Tenant Targeting

Serves Lowest Income for Long Durations

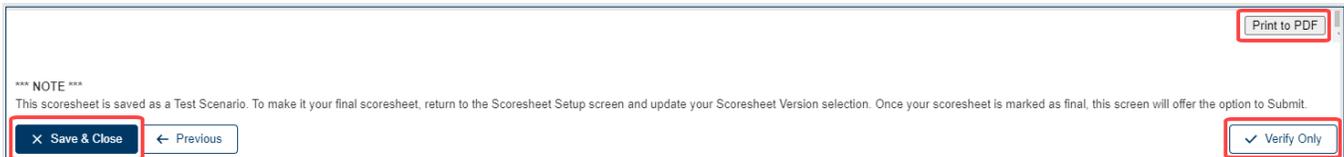
Click the **Save & Next button** to proceed to Review and Report. Click the **Save & Close** button if you wish to exit the Scoring Wizard and complete scoring at another time.

## Review and Report

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

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

Figure 15: Test Scenario Buttons



- **Print to PDF:** Generates a PDF version of your Scoring Review Report.
- **Verify Only:** 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:** Exits the Scoring Wizard, allowing you to complete scoring at another time.

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

Figure 16: Final Version Submit Button



- **Verify & Submit:** Performs the same actions as the Verify Only button, and upon clearing all errors, provides 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 exit 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.

## Submitting Your Scoresheet

When you are ready to submit your final scoresheet:

- Ensure that your scoresheet version is marked as "Final Version" on the Scoresheet Setup page.
- Navigate to the **Review and Report** tab.
- Click **Verify & Submit**. Once validation is successful, you will be prompted to submit your scoresheet.
- Click **Yes – Submit Scoresheet**. You will receive a confirmation message that the scoresheet was successfully submitted.
- Click **Finish** to exit the Scoring Wizard.

Keep the following in mind:

- **Submission Deadline:** You must submit your scoresheet before the deadline. Late submissions will not be accepted. If you submit your scoresheet before the deadline and need to make changes, contact [mhfa.app@state.mn.us](mailto:mhfa.app@state.mn.us).
- **Editing Restrictions:** Once submitted, you will no longer be able to edit your submitted scoresheet. However, you can still create new, clone, and/or edit existing test scenarios.
- **Application Checklist:** Upload all scoring documentation into the Application checklist. You must submit your application checklist before the deadline.

# Questions

For technical questions, contact [mhfa.app@state.mn.us](mailto:mhfa.app@state.mn.us).