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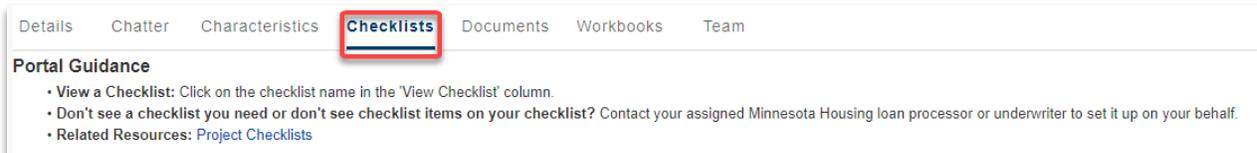
For the Pre-Application, Intent to Apply, and Application checklists, you will need to [setup your project characteristics](#) before working on your customized checklist.

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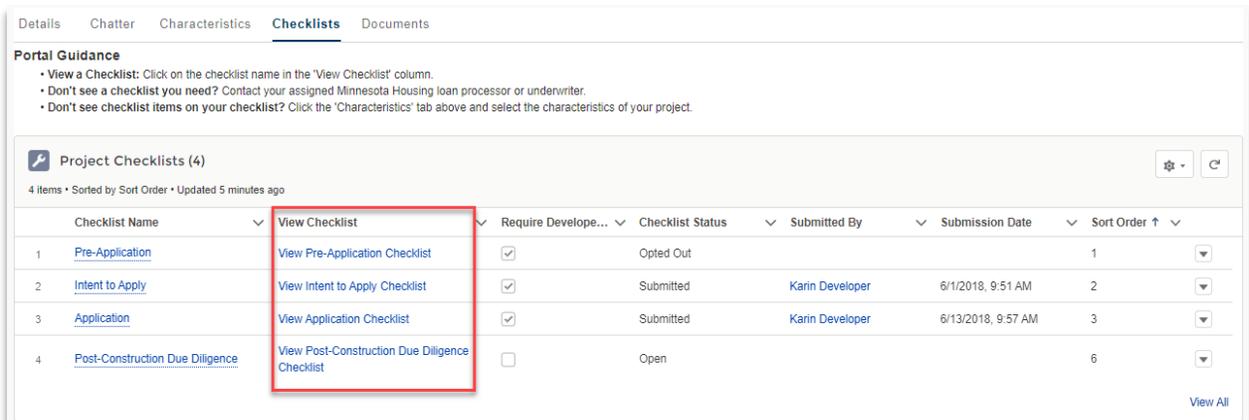
- Go to the **Checklists** tab on the project page.

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

Checklist Features

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 items.** Click on the name of a checklist item to upload documentation, access links to forms or resources, and view help text.

3. **Upload Status.** Not sure if you've uploaded a document yet? Check the upload status.

4. **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.

5. **File Last Modified.** See who last updated files associated with this checklist item and when it was modified.

6. **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.

7. **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', a **Submit for Review** button will appear. 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!

8. **Search.** Looking for a specific checklist item? Use the search feature to jump to it quickly by typing the name of the item.

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,' a Submit button will appear. Click **Submit** for Minnesota Housing to receive your 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!

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.** Click to return to the checklist page.
3. **Files.** Upload files related to this checklist item.
4. **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.
5. **Required File Extension.** Some checklist items have a required file extension such as .xlsm or .pdf. Refer to the Required File Extension field for details.
6. **Quick Links.** Download forms, view related websites, or access resources by using the Quick Link.
7. **Maximum Number of Attachments.** Some checklist items have a maximum number of attachments you can upload to it. See the Managing Files guide for more details.

8. **Checklist Item Opt Out.** Checklist item not apply to you? Check the 'Checklist item Opt Out' field by double-clicking on the box or clicking on the pencil icon.

Checklist Item Opt Out

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9. **Error Message.** Refer to this field for additional detail about any error messages after uploading files.
10. **Help Text.** Refer to the Help Text section at the bottom of the page for additional guidance about this checklist item.

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.

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 of 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

Contact mhfa.app@state.mn.us.