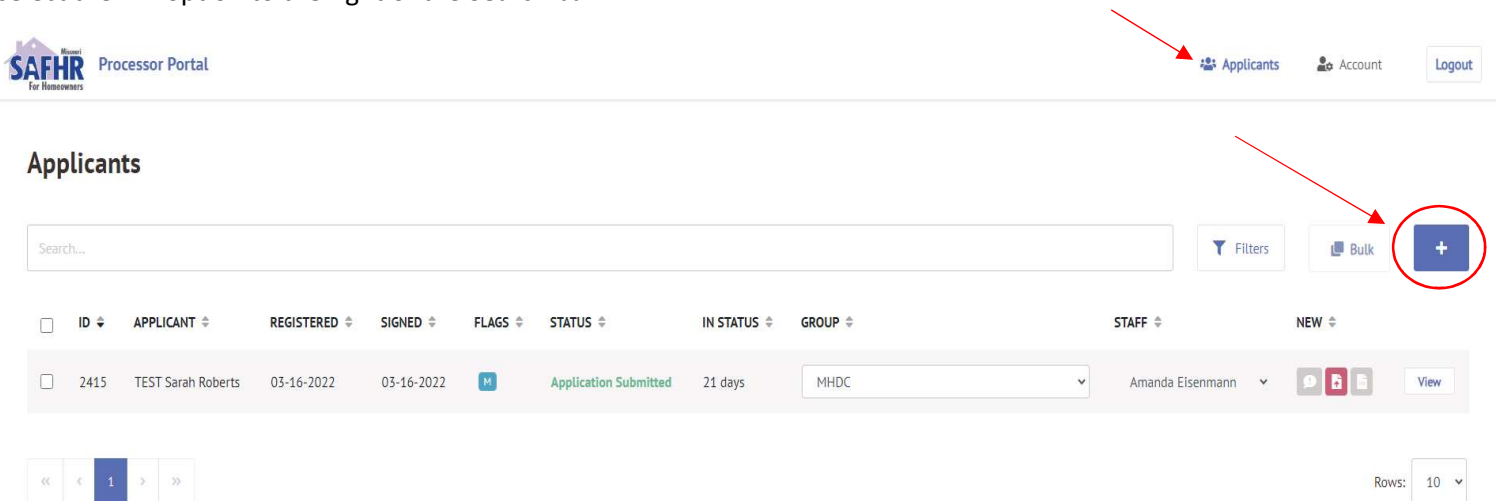




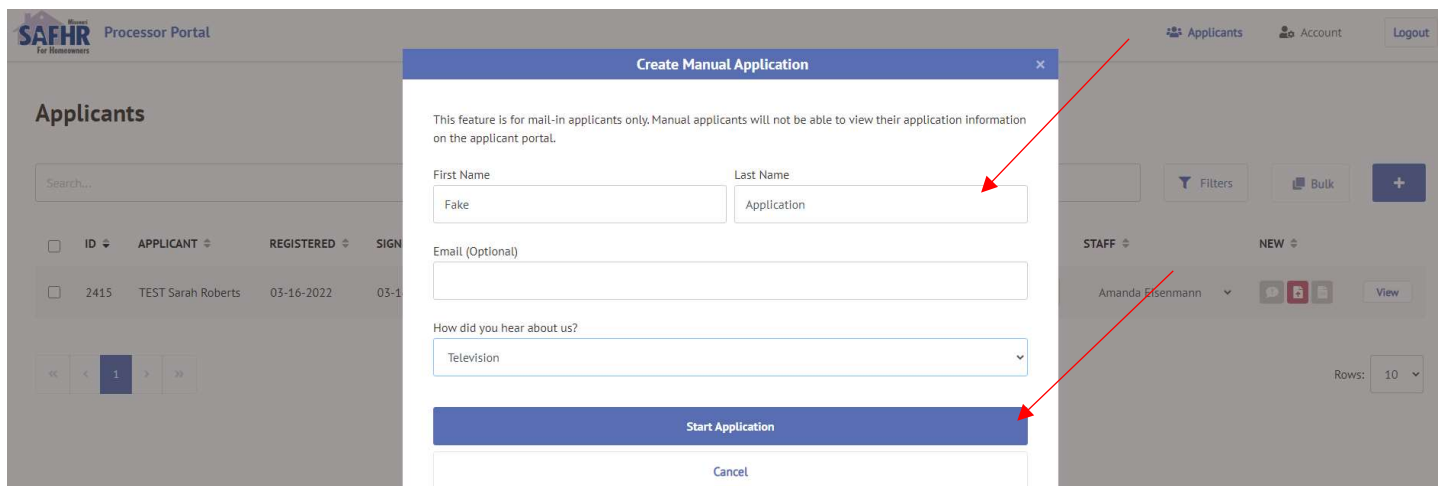
State Assistance for Housing Relief Mortgage Assistance Counseling Manual Application Instructions

The manual application feature is a tool designed for Mortgage Assistance Counseling (MAC) agencies who are assisting applicants that are unable to complete the application electronically. MAC agencies should provide applicants with the SAFHR for Homeowners Paper Application, then use this information to complete the online manual application. This document is intended as a guide to MAC agencies who are assisting applicants with their SAFHR for Homeowners online application and **is not intended for the use of individual applicants.**

1. Once you have logged into the online portal, select “Applicants” located in the upper-right corner of the screen. Then select the “+” option to the right of the Search bar.



2. After you’ve selected the “+”, a window will appear to begin your Manual Application. Enter the First and Last Name of the applicant, along with their Email Address (if applicable), and how they heard about the SAFHR for Homeowners program. Click “Start Application” at the bottom of the window. **Note: Agencies should not use their own emails. Once an email is used, it cannot be used again.**



3. You'll start by navigating to the "Applicant" section in the Toolbar on the lefthand side of your screen Click the "Edit" button in the top-right corner of the application.

< Back to Applicant List / Fake Application / Applicant

Fake Application

ID: 3798

[Edit Flags](#)

Status **Applicant**

Communications **Fake Application**

Recertification

First name: Fake

Middle name:

Last name: Application

Primary Phone Number:

Secondary Phone Number:

Email: noreply+c71a3832-8d4f-423c-b128-e5e110b14428@safhrforhomeowners.com

Date of birth:

Gender:

Race:

Ethnicity:

Veteran:

Are you disabled?:

Assignee

Select Option

[Edit](#)

4. Input primary applicant information.

Status **Applicant**

Communications

Recertification

Pre-Screen

Applicant

Co-Applicant(s)

Household

Loans

Assistance

Financials

Hardship

Documents

Signatures

First Name * Middle Name Last Name *

Fake Application

Primary Phone Number * Secondary Phone Number

(555) 555-5555 (555) 555-5555

Email

noreply+c71a3832-8d4f-423c-b128-e5e110b14428@safhrforhomeowners.com

Date of Birth *

01/01/1980

Gender *

Male

Race *

American Indian / Alaska Native

Ethnicity *

Hispanic or Latino

Veteran *

Yes No

5. Input subject property information into the “About the Property” portion, then select “Verify Address”.

About the Property

Property Type *
Single Family Residence

Address 1 * 920 Main | Address 2

County *
Jackson

City * KANSAS CITY | State Missouri | Zip * 64105

Census Tract (SDI)
29095015701

Census Tract (FBP)
29095015700

Is this property address also your mailing address? *
 Yes No

Verify Address

Cancel

6. If the “Suggested Address” looks correct, select “Use This Address”. Save this section by clicking the “Save” button at the bottom of the screen once all fields are completed.

Address Verification

We are unable to verify the address you entered as your **Property Address** but found a close match. Please confirm the address you'd like to use or try again.

You entered

920 Main St., Kansas City, Missouri 64105

Suggested Addresses

920 MAIN ST, KANSAS CITY, MO, 64105

Use This Address

Cancel

7. Now you'll move onto the Co-Applicant(s) section. If there is a co-applicant on the paper application, selected "Add Co-Applicant". If there is not a co-applicant, select "I Don't Have Co-Applicants".

< Back to Applicant List / Fake Application / Co-Applicant

Fake Application

ID: 3798 Phone: (555) 555-5555

Edit Flags

Status

Co-Applicant(s)

Communications

There are currently no co-applicants in your system.

Recertification

Pre-Screen

Applicant

Co-Applicant(s)

Household

Loans

Assistance

Assignee

Select Option

+ Add Co-Applicant

I Don't Have Co-Applicants

8. If you selected "Add Co-Applicant" enter their information from the paper application here. Then select the "Save" button at the bottom of the screen.



Processor Portal

Applicants

Account

Status

Co-Applicant(s)

Communications

Does this Co-Applicant live in the property? *

Yes No

Recertification

Pre-Screen

Applicant

Co-Applicant(s)

Household

Loans

Assistance

Financials

Hardship

Documents

First Name *

Middle Name

Last Name *

Primary Phone Number *

Secondary Phone Number

(555) 555-5555

(555) 555-5555

Email Address *

Date of Birth *

mm/dd/yyyy

Gender *

Select Gender

9. Once the Co-Applicant section is complete, you'll move onto the Household section. To add household members, select the "Add Household Member" button in the top right hand corner of the screen.

< Back to Applicant List / Fake Application / Household

Fake Application

ID: 3798 Phone: (555) 555-5555

Edit Flags

Assignee
Select Option

Status

Household

Search...

Recertification

Pre-Screen

Applicant

Co-Applicant(s)

Household

Loans

Assistance

NAME	TYPE	RELATIONSHIP	DATE OF BIRTH	EMPLOYMENT STATUS
Fake Application	Applicant		01-01-1980	Unemployed

Rows: 10

+ Add Household Member

10. Enter the first household member's information (**do not re-enter the primary applicant or co-applicant's information here**) from the paper application, then click "Save". Repeat this until the entire household has been added. If there are not additional household members, you can skip this section.

FHR Processor Portal

Applicants Account Logo

< Back to Applicant List / Fake App

Fake Applicat

ID: 3798 Phone: (555) 55

Edit Flags

Status

Ho

Communications

Recertification

Pre-Screen

Applicant

Co-Applicant(s)

Household

Loans

Assistance

Create Household Member

First Name * Middle Name Last Name *

Date of Birth *
mm/dd/yyyy

Social Security Number *

Employment Status (select all that apply) *
Select...

Relationship To Homeowner (select all that apply) *
Select...

Save

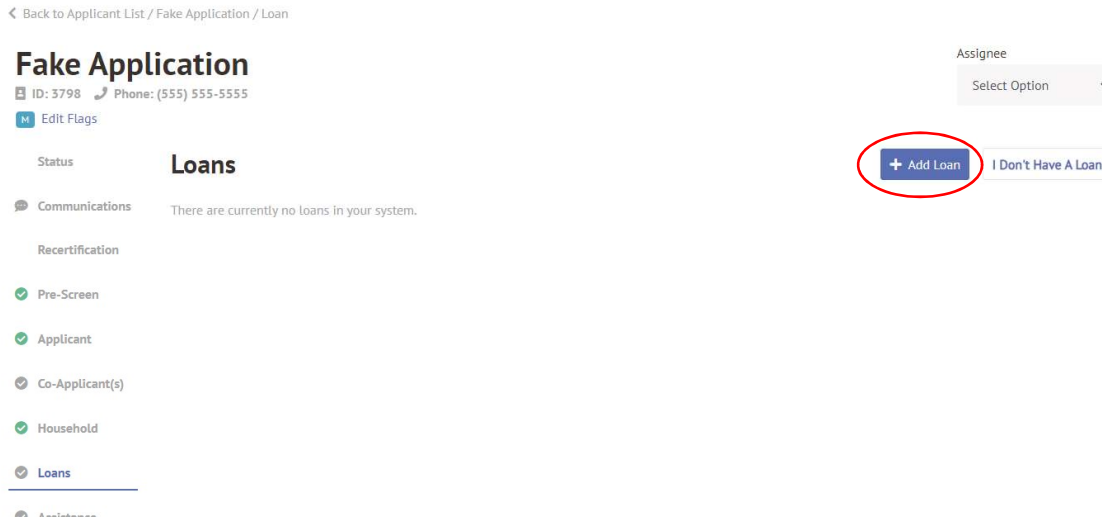
Cancel

Assignee
Select Option

+ Add Household Member

Rows: 10

11. Once you have completed the “Household” section, you will move onto “Loans”. Select the “Add Loan” button in the top right-hand corner of the application.



12. Enter the loan information from the paper application. When this is complete, select “Save” at the bottom of the screen. Repeat this step if there are additional loans on the subject property.

The screenshot shows the 'Loans' form. The left sidebar is the same as in the previous image. The main content area is titled 'Loans' and contains the following fields:

- Lender ***: A dropdown menu with 'Select' as the current selection. A red arrow points to this field.
- Mortgage Type ***: A dropdown menu with 'Select' as the current selection.
- Original Mortgage Balance ***: A text input field with a '\$' symbol on the left.
- Purchase Date ***: A date input field with the format 'mm/dd/yyyy' and a calendar icon on the right.
- Mortgage Account Number ***: A text input field.
- Current Mortgage Balance ***: A text input field with a '\$' symbol on the left.

13. Once you've completed the "Loans" section, you can start the "Assistance" portion of the application. Click the "Edit" button in the top right-hand corner of the screen.

Fake Application
ID: 3798 Phone: (555) 555-5555
Edit Flags

Assignee
Select Option

Status

Assistance

Communications To which of the following programs are you applying for assistance? (Your application will be reviewed on a program basis. You might be approved for assistance through one or multiple of these programs but not others). **Edit**

Recertification

Reinstatement
Reinstatement assists in the cure of delinquent first and subordinate mortgage loan arrearages, which may also include escrow shortages or deficiencies and payments needed to reinstate loans from foreclosure or deferred payments.

Pre-Screen

Applicant

Co-Applicant(s)

Household

Loans

Assistance

Financials

14. The only option for assistance, at this time, is Reinstatement. Check the box next to "Reinstatement", then click "Save" at the bottom of the screen.

< Back to Applicant List / Fake Application / Assistance

Fake Application

ID: 3798 Phone: (555) 555-5555
Edit Flags

Assignee
Select Option

Status

Assistance

Communications To which of the following programs are you applying for assistance? (Your application will be reviewed on a program basis. You might be approved for assistance through one or multiple of these programs but not others).

Recertification **Reinstatement**
Reinstatement assists in the cure of delinquent first and subordinate mortgage loan arrearages, which may also include escrow shortages or deficiencies and payments needed to reinstate loans from foreclosure or deferred payments.

Pre-Screen

Applicant

Co-Applicant(s)

Household

Loans

Assistance

Save

Cancel

15. Once you've completed the "Assistance" portion of the application, you'll move on to "Financials". First, select the "Add Income" button in the middle-right section of the screen.

Back to Applicant List / Fake Application / Financial

Fake Application

ID: 3798 Phone: (555) 555-5555

Edit Flags

Assignee: Select Option

Financials

Total Monthly Income:	Total Annual Income:	Total Monthly Expenses:	Total Annual Expenses:
\$0.00	\$0.00	\$0.00	\$0.00

Debt to Income Ratio (DTI):	Net Disposable Income (NDI):	Prioritization AMI (100%):	Eligibility AMI (150%):	Household Members:
0.00%	\$0.00	0%	0%	1

Income

Please input all income sources you and your co-applicants currently receive.

No income source found.

[+ Add Income](#)

Expenses

Please input all expenses you and your co-applicants currently pay.

[+ Add Expense](#)

Processor Portal

Applicants Account Log

Back to Applicant List / Fake Application

Fake Application

ID: 3798 Phone: (555) 555-5555

Edit Flags

Status

Communications

Recertification

Pre-Screen

Applicant

Co-Applicant(s)

Household

Loans

Assistance

Financials

Hardship

16. Input the income information from the paper application, then select "Save". Continue this step until all of the household income has been added.

Add Income Source

Household Member *

Select...

Category *

Select...

Frequency *

Select...

Amount *

\$

Description

[Save](#)

Cancel

Processor Portal

Applicants Account Log

Back to Applicant List / Fake Application

Fake Application

ID: 3798 Phone: (555) 555-5555

Edit Flags

Status

Communications

Recertification

Pre-Screen

Applicant

Co-Applicant(s)

Household

Loans

Assistance

Financials

Hardship

17. Once the household income has been added, you are ready to move onto the next section. Please **do not add household expenses to this section**. This information is not needed to move forward with the application.

Fake Application Assignee
Select Option

ID: 3798 Phone: (555) 555-5555
[Edit Flags](#)

- Status
- Communications
- Recertification
- Pre-Screen
- Applicant
- Co-Applicant(s)
- Household
- Loans
- Assistance
- Financials**
- Hardship
- Documents
- Signatures

Financials

Total Monthly Income:	Total Annual Income:	Total Monthly Expenses:	Total Annual Expenses:
\$0.00	\$0.00	\$0.00	\$0.00

Debt to Income Ratio (DTI):	Net Disposable Income (NDI):	Prioritization AMI (100%):	Eligibility AMI (150%):	Household Members:
0.00%	\$0.00	0%	0%	1

Income

Please input all income sources you and your co-applicants currently receive. [+ Add Income](#)

Fake Application	My household does not receive income from any sources	Bi-Weekly	\$0.00	unemployed	Edit X
------------------	---	-----------	--------	------------	--

Expenses

Please input all expenses you and your co-applicants currently pay. [+ Add Expense](#)

No expense found.

18. Once the “Financials” section is complete, you will move onto “Hardship”. Select the “Edit” button in the top right-hand corner of the screen.

[Back to Applicant List / Fake Application / Hardship](#)

Fake Application Assignee
Select Option

ID: 3798 Phone: (555) 555-5555
[Edit Flags](#)

- Status
- Communications
- Recertification
- Pre-Screen
- Applicant
- Co-Applicant(s)
- Household
- Loans
- Assistance
- Financials
- Hardship**

Hardship

Reason(s) for hardship: [Edit](#)

A material reduction in household income (For example: a job loss, furlough, reduction in hours or pay, reduction in business hours or capacity, temporary or permanent closure of a business, or another income-reducing scenario associated with the coronavirus pandemic)

A material increase in living expenses (For example: an increase in medical expense, the expense of care for additional family members, increase in childcare costs, increase in household size, and/or any other expense increasing scenario for out-of-pocket household expenses related to the coronavirus pandemic)

Other financial hardship

19. Input the hardship information from the paper application, then select “Save”.

← Back to Applicant List / Fake Application / Hardship

Fake Application

ID: 3798 Phone: (555) 555-5555

Assignee: Select Option

Hardship

Reason(s) for hardship:

A material reduction in household income (For example: a job loss, furlough, reduction in hours or pay, reduction in business hours or capacity, temporary or permanent closure of a business, or another income-reducing scenario associated with the coronavirus pandemic)

Explanation: Lost my job.

A material increase in living expenses (For example: an increase in medical expense, the expense of care for additional family members, increase in childcare costs, increase in household size, and/or any other expense increasing scenario for out-of-pocket household expenses related to the coronavirus pandemic)

Other financial hardship

Save

Cancel

20. After completing the “Hardship” section, you will move on to “Documents”. Upload all corresponding documentation into their appropriate folders by selecting “Upload File”.

Fake Application

ID: 3798 Phone: (555) 555-5555

Assignee: Select Option **Saved!**

Documents

Identity Verification *
See Description
Upload File

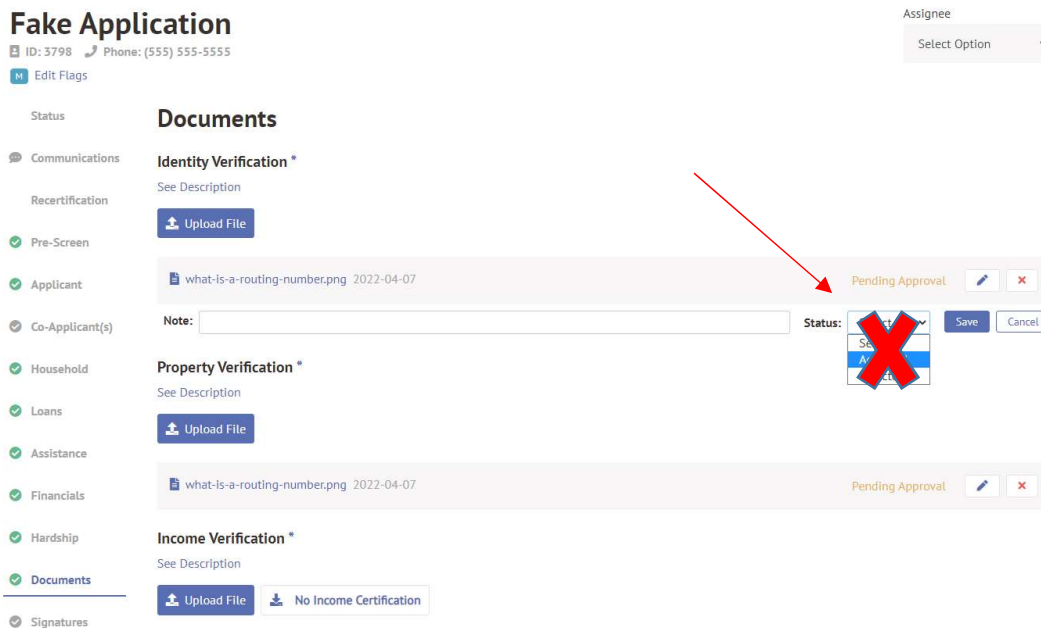
Property Verification *
See Description
Upload File

Income Verification *
See Description
Upload File **No Income Certification**

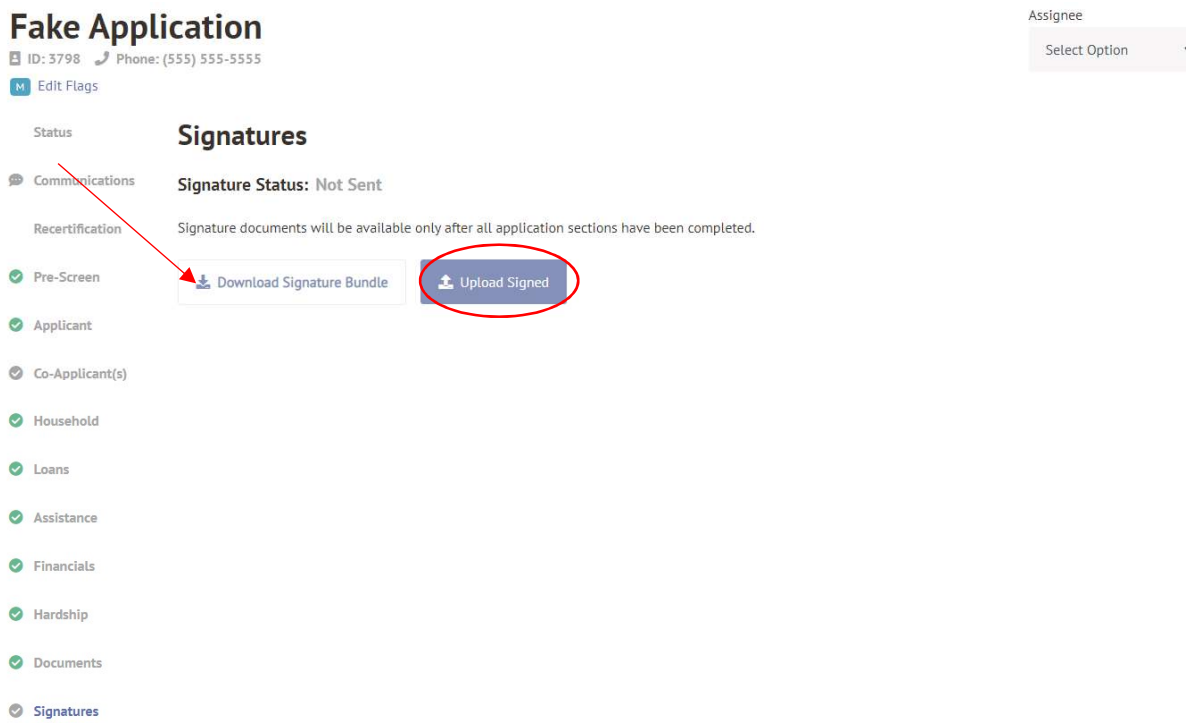
Internal Documents
See Description
Upload File

Additional Documents
See Description
Upload File

21. After uploading the document, you may see a “Status” drop-down appear next to the “Notes” section. This may also appear as an option to “edit”. **Do not make any changes to the status of the documents. This will be updated by our processing team.**



22. Once all documentation has been uploaded, you will upload the signature packet that was included in the paper application. First, you must download the signature bundle, even if you already have a completed packet to upload. Downloading the signature bundle will unlock the “Upload Signed” option. To upload the signed packet, select, “Upload Signed”. ****Please note that the Signature Bundle does not include the Homeowner-Agency Authorization or the Applicants Consent to Release of Information. If you download the signature bundle, these two forms will have to be manually uploaded**



23. Once the signature documents have been uploaded, you will see a “Status” drop-down appear next to the “Notes” section. This may also appear as an option to “edit”. **Do not make any changes to the status of the signature bundle. This will be updated by our processing team.**

← Back to Applicant List / Fake Application / Signatures

Fake Application

ID: 3798 Phone: (555) 555-5555

Assignee: Ken Wright

Edit Flags

- Status
- Communications
- Recertification
- Pre-Screen
- Applicant
- Co-Applicant(s)
- Household
- Loans
- Assistance
- Financials
- Hardship
- Documents
- Signatures

Signatures

Signature Status: **Completed**

Download Signature Bundle Upload Signed

what-is-a-routing-number.png 2022-04-07

Note: Status: **Pending Approval** Save Cancel

24. The application has now been submitted. You can check the status of the application by selecting “Applicants” in the top right-hand corner of the screen. The status of the application will show “Application Submitted”. **Note: Once you refresh the page, the application will disappear from the list. The application will only re-appear if there are corrections needed.**

Processor Portal

Applicants Account Logout

Applicants

Search...

Filters Bulk +

ID	APPLICANT	REGISTERED	SIGNED	FLAGS	STATUS	IN STATUS	GROUP	STAFF	NEW
3798	Fake Application	04-07-2022	04-07-2022	M	Application Submitted	0 days	MHDC	Ken Wright	View
2415	TEST Sarah Roberts	03-16-2022	03-16-2022	M	Application Submitted	21 days	MHDC	Amanda Eisenmann	View

Rows: 10

25. If the application needs corrections after review, it will re-appear in your list and the Status will be “Cure”. Select “View” next to the application to review the corrections.

Processor Portal

Applicants Account Logout

Applicants

Search... Filters Bulk +

ID	APPLICANT	REGISTERED	SIGNED	FLAGS	STATUS	IN STATUS	GROUP	STAFF	NEW
3798	Fake Application	04-07-2022	04-07-2022	M	Cure	0 days	MHDC	Select	View
2415	TEST Sarah Roberts	03-16-2022	03-16-2022	M	Application Submitted	21 days	MHDC	Amanda Eisenmann	View

Rows: 10

26. You can review the corrections in the “Communications” section of this application. Your processor will send all correspondence regarding corrections in this tab. You can also communicate with the processor via this section. Corrections may require you to upload additional supporting documentation.

Back to Applicant List / Fake Application / Communications

Fake Application

ID: 3798 Phone: (555) 555-5555

Edit Flags

Status

Assignee: Select Option

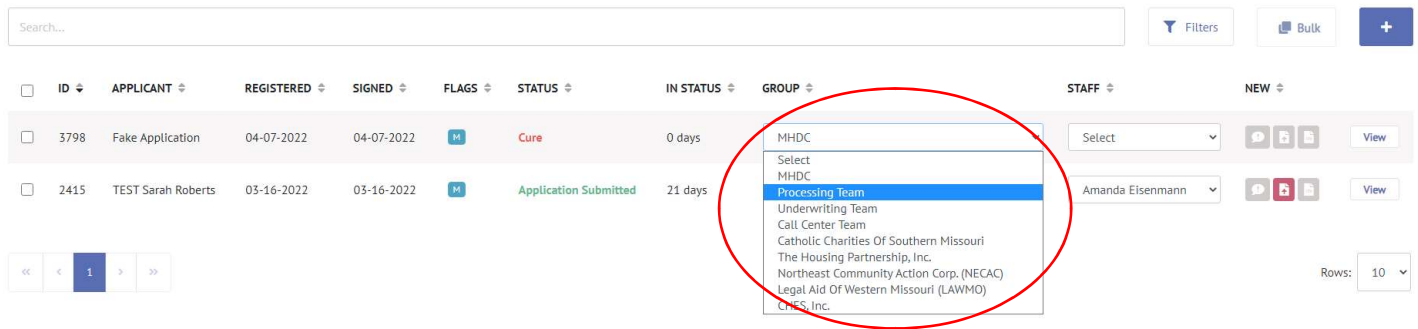
Communications

Steve Whitson Apr 07, 11:33 AM

Text communications.

- Recertification
- Pre-Screen
- Applicant
- Co-Applicant(s)
- Household
- Loans
- Assistance

27. Once all corrections have been made, submit the application by selecting “Processing Team” under the “Group” drop-down. Once the processor begins reviewing the updates, the status will change to “Under Review” **Note: The application will disappear from the list once the page is refreshed.**



28. You will continue this process until all corrections have been made and a decision has been made regarding the eligibility of the application. Once eligibility has been determined, the application process is complete.

Note: Applications assigned to your agency will be viewable by all agency team members. Once the applications are submitted or assigned to the processing group, these applications will no longer be viewable until they are sent back for corrections.

- END OF SAFHR-MAC MANUAL APPLICATION INSTRUCTIONS -

For questions or feedback, please contact:
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816-759-6698