



State Assistance for Housing Relief Mortgage Assistance Counseling Manual Application Portal Training

SAFHR-MAC Manual Application Portal Training
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Missouri Housing Development Commission



Overview

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- **User Registration**
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Login Credential Request

- Complete form SP-113 for all staff members who need login credentials to the Manual Application Portal.
- By signing this form, the staff member is attesting that they have viewed and understand this training video, and feel ready to start completing manual applications with clients.
- You can make the request individually, or use the additional pages to request login credentials for multiple staff members.
- Staff **MUST** complete the training before requesting login credentials.
- Submit SP-113 to Amanda Eisenmann at amanda.eisenmann@mhdc.com.
- Staff will receive an email shortly after with login instructions.



Form: SP-113

**State Assistance for Housing Relief
Mortgage Assistance Counseling (SAFHR-MAC)
Manual Application Training Certification**

The Missouri Housing Development Commission (MHDC) has developed a Manual Application Portal to assist Mortgage Assistance Counseling (MAC) agencies in their work with Missouri homeowners. The portal will allow MAC agency staff members to create an application on behalf of the Homeowner, with the Homeowner's consent, in attempt to minimize the technological and geographic barriers experienced by some SAFHR applicants. To gain access to this portal, each user must complete this form, certifying that they have watched the SAFHR-MAC Manual Application training video.

Complete the fields below for each staff member that is requesting login credentials to the Manual Application Portal. By signing this document, agency staff is attesting that they have watched and understand the Manual Application Training video in its entirety. Once submitted and approved, the user will receive an email at the address listed below with login instructions.

Agency Name

Missouri Housing Development Commission

Staff Name (First, Last)


Amanda Eisenmann

Staff Email

amanda.eisenmann@mhdc.com


By signing below, I am certifying that I have watched and understand the SAFHR-MAC Manual Application training video, in its entirety.

4/29/2022
Date



Staff Signature



User Registration

 noreply@homeownertoolbox.com |  Amanda Eisenmann
You've been invited to the HAF Processor Portal.

3/17/2

 If there are problems with how this message is displayed, click here to view it in a web browser.



**Welcome Amanda Eisenmann,
You've been invited to join State
Assistance for Housing Relief**

[Register →](#)



Paper Application Checklist

- **Identity Verification**
 - Driver's License/State ID
 - Government Issued ID
 - Passport
 - Military ID
 - Corporate Photo ID
 - Tribal Photo ID
- **Property Verification**
 - Mortgage Statement for any outstanding mortgages
- **Income Verification**
 - If employed: copy of paystubs for all employment, copy of previous year's tax return transcripts and W-2s.
 - If self-employed: a copy of previous filed 1040 return, YTD Profit and Loss statement, or IRS Form 1099
 - If unemployed: unemployment benefit statement, retirement/pension statement, SSI/SSDI award letter etc., if applicable.
 - If no income: completed No Income Certification Form



Paper Application Checklist (contd.)

- **Proof of Hardship**
 - SAFHR for Homeowners Hardship Attestation
- **Signed Documents**
 - Homeowner – Agency Authorization
 - Borrower Consent Form
 - Hardship Attestation
 - Income Certification
 - Homeowner Certifications
 - No Income Certification (if applicable)
 - SP-102 Release of Information
 - SP-103 SAFHR for Homeowners Eligibility

****All signature documents are provided in the Documents section of the Paper Application packet****

SAFHR-MAC Manual Application Instructions

- Before starting your application, open the SAFHR-MAC Manual Application Instructions to use as a guide through the Manual Application Process. The instructions can be found under “Funded Agency Forms” at <http://www.mhdc.com/COVID%20Assistance/SAFHR-MAC/index.htm>


Missouri SAFHR For Homeowners 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.**



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If you are outside the United States, please use the link <http://datacenter.mhdc.com> or call 877.625.1177 with our available resources.



Manual Application Tutorial

Tutorial:

<https://stage-haf-mo-admin.homeownertoolbox.com/>

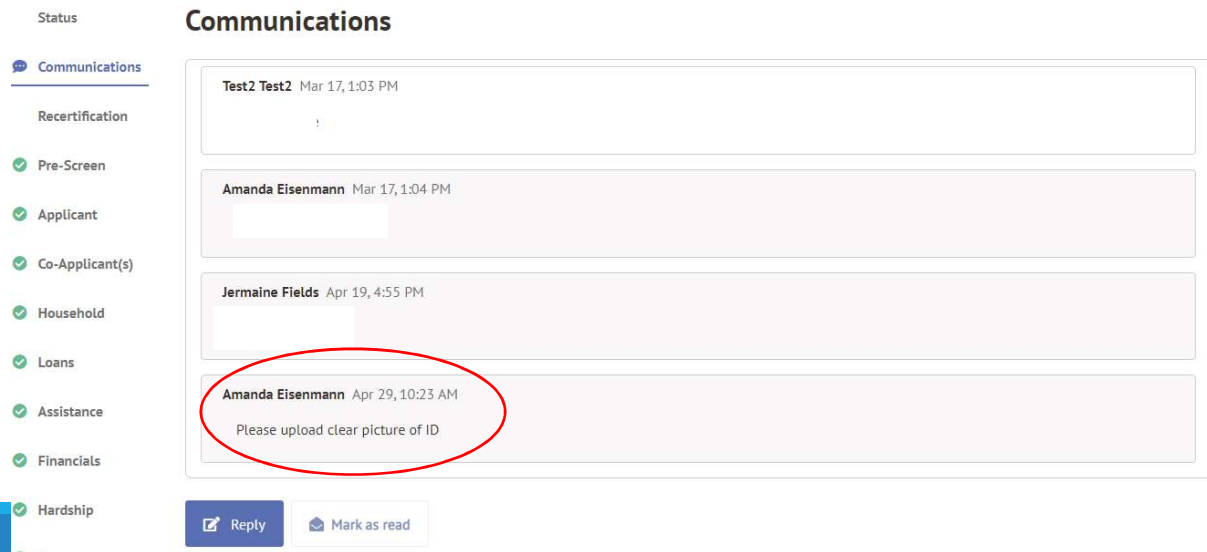
Manual Application Cures

- You will need to monitor the applicant portal for applications that have been re-assigned for corrections.
- Applications sent back for corrections will show a status of “Cure”.
- To view the corrections, go to the “Communications” tab within the application.

<input type="checkbox"/>	ID	APPLICANT	REGISTERED	SIGNED	FLAGS	STATUS	IN STATUS
<input type="checkbox"/>	80	Test test	04-29-2022		M	Pre-Sign (Created)	2 days
<input type="checkbox"/>	79	RJ	04-21-2022		M	Pre-Sign (Created)	10 days
<input type="checkbox"/>	78	Scott Pemdale	04-21-2022	04-21-2022	AMI SDI	Application Submitted	10 days
<input type="checkbox"/>	77	Summer Time	04-19-2022	04-19-2022	DUP M	Cure	12 days
<input type="checkbox"/>	76	Testing AppH	04-19-2022		M	Pre-Sign (Hardship)	13 days

Manual Application Cures (contd.)

- Review the CURES in the “Communications” tab of the application.
- Make the requested corrections in the application, by using the document upload fields (if applicable) and/or communication with your processor by replying in “Communications”..



Status

Communications

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

Test2 Test2 Mar 17, 1:03 PM

Amanda Eisenmann Mar 17, 1:04 PM

Jermaine Fields Apr 19, 4:55 PM

Amanda Eisenmann Apr 29, 10:23 AM
Please upload clear picture of ID

Reply Mark as read

CURES Submission

- Once all CURES have been corrected, re-submit the application to our processing team by navigating to the “Applicants” toolbar, and selecting “Processing Team” from the drop down under “Groups”.
- Your application corrections are now submitted for review to our SAFHR processing team.

ID	APPLICANT	REGISTERED	SIGNED	FLAGS	STATUS	IN STATUS	GROUP	STAFF	NEW
89	some body	05-13-2022		M	Pre-Sign (Created)	2 days	MHDC Team	Select	View
87	JarJar Binks	05-13-2022		M	Pre-Sign (Created)	2 days	MHDC Team	Select	View
86	Sarah Jones	05-12-2022	05-12-2022	DUP M SSN	Application Submitted	3 days	Processing Team	Amanda Eisenmann	View
85	Thomas Johnson	05-12-2022		M	Pre-Sign (Created)	3 days	Processing Team	Amanda Eisenmann	View
84	George Thomas	05-12-2022		M	Pre-Sign (Household)	3 days	Processing Team	Amanda Eisenmann	View
83	Sarah Roberts	05-12-2022		M	Pre-Sign (Created)	3 days	Processing Team	Amanda Eisenmann	View



Client File Checklist

- It is important to maintain all of the appropriate records on-site when completing a manual application. Below are the documents that should be included in every Manual Application file:
 - A copy of the Paper Application, if applicable.
 - Copies of all Identity, Property, Income Verification Documents.
 - SAFHR for Homeowners Hardship Attestation
 - Homeowner-Agency Authorization
 - Borrower Consent Form
 - Income Certification
 - Homeowner Certifications
 - No Income Certification (if applicable)
 - SP-102 Release of Information
 - SP-103 SAFHR for Homeowners Eligibility
 - Detailed case notes for all services provided



Thank you for attending!

Amanda Eisenmann – Housing Program Administrator

amanda.eisenmann@mhdc.com

816-759-6698

