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

SAFHR-MAC Manual Application Portal Training
Amanda Eisenmann
Housing Program Administrator
Missouri Housing Development Commission

Overview

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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 Certifcation

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 techonological and geographic barriers experienced by some SAHFR 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

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

Staff Name (First, Last)	Staff Email
Amanda Eisenmann	amanda.eisenmann@mhdc.com

4/29/2022	
Date	Staff Signature

User Registration

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

Manual Application Tutorial

Tutorial:

https://stage-haf-mo-admin.homeownertoolbox.com/
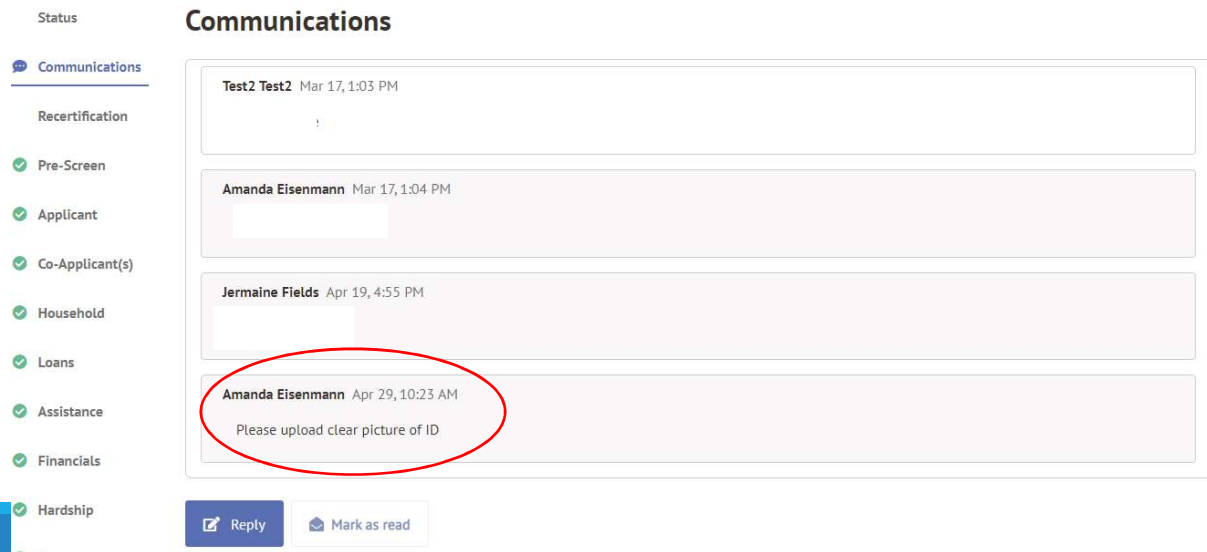
Manual Application Cures

- 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.

	ID	APPLICANT	REGISTERED	SIGNED	FLAGS	STATUS	IN STATUS
☐	80	Test test	04-29-2022		M	Pre-Sign (Created)	2 days
☐	79	R J	04-21-2022		M	Pre-Sign (Created)	10 days
☐	78	Scott Pemdale	04-21-2022	04-21-2022	AMI SDI	Application Submitted	10 days
☐	77	Summer Time	04-19-2022	04-19-2022	DUP M	Cure	12 days
☐	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"..

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
							Select		
							MHDC Team		
85	Thomas Johnson	05-12-2022		M	Pre-Sign (Created)	3 days	Processing Team	Amanda Eisenmann	View
							Call Center		
							Catholic Charities Of Southern Missouri		
84	George Thomas	05-12-2022		M	Pre-Sign (Household)	3 days	Underwriting Team	Amanda Eisenmann	View
							The Housing Partnership, Inc		
							Northeast Community Action Corp. (NECAC)		
83	Sarah Roberts	05-12-2022		M	Pre-Sign (Created)	3 days	Legal Aid Of Western Missouri (LAWMO)	Amanda Eisenmann	View
							CHES, Inc		

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
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816-759-6698