# Essential Single Family Rehabilitation (ESFR) Loan Pool Portal

**Unit Monitoring** 







#### **Review of Portal Basics**

All ESFR Monitoring file will be uploaded directly through the ESFR Loan Pool Portal (Portal)

- Website: <a href="https://www.nchfa.org/LPPortal">https://www.nchfa.org/LPPortal</a>
- The portal is optimized for Internet Explorer
- Usernames and Passwords will be emailed to you. NCHFA won't know your password, but the compliance coordinator can reset it.
- Messages come to everyone with a login by default.



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### Why the new monitoring process?

- All required monitoring documents will now be uploaded directly in the portal.
- Only units selected to be monitored are required to upload documents.
- This is a more secure way of sending files.

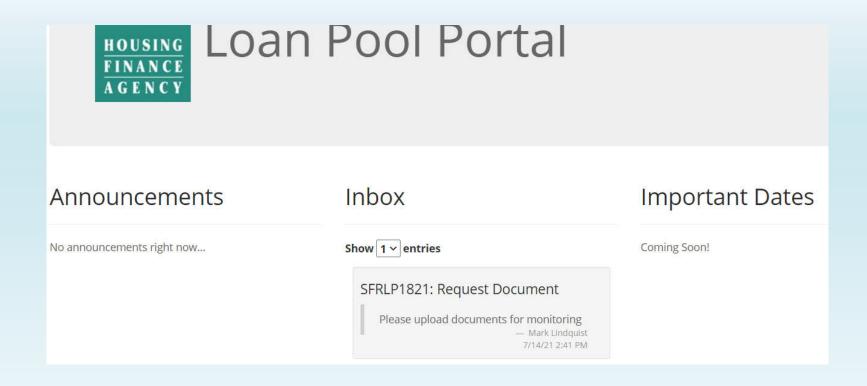


#### **Process Overview**

- Your case manager will select units to be monitored based on the capacity rating
- A portal message will be sent to the ESFRLP member to request the uploading of monitoring documents
- Portal documents slots will be automatically added for the required or optional documents
- Members will upload and submit all documents in a timely manner
- Your case manager and the compliance coordinator will review the documents
  - Your case manager will likely also schedule a visit to inspect the work and speak with the homeowner. If you see Monitoring PI Status is "In Review" this means the unit has been selected for Physical Inspection.

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When a unit is selected to be monitored by your case manager, an email and message will be sent to the member to Please upload documents for monitoring.





#### Click on the briefcase to see Awaiting Monitoring Document Upload



Click the blue icon

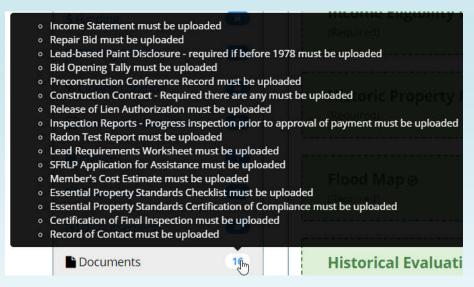
FR= File Review; PI= Physical Inspection

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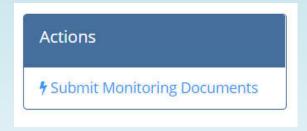
## Hover your mouse over the Menu Documents section and you will see the list of documents to upload

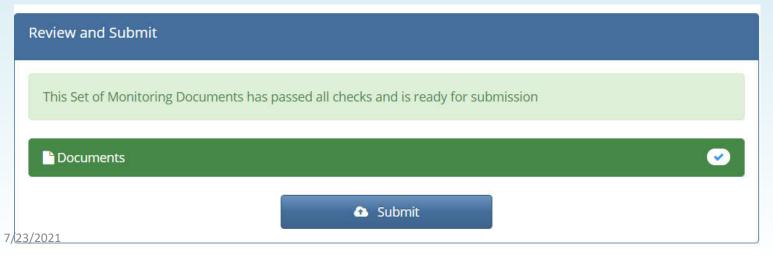


Required documents will be shaded red, optional are blue, green are already uploaded



# When all the red shaded document slots are green, click the Submit Monitoring Documents







After the documents have been reviewed the case manager will contact the member and discuss any issues and schedule an appointment to visit the homeowner to inspect the rehab work that was completed.







### Special note:

 "See slides 15-17 on the recently updated "Partner Portal: Invoices and Requisitions" guide located at www.NCHFA.com, ESFRLP, Forms and Resources."



#### **Portal Problems?**

If you have any problems with portal operations or have any questions, please contact:

Mark Lindquist mwlindquist@nchfa.com

919-501-4263

Donna Coleman

djcoleman@nchfa.com

919-981-5006

**Chuck Dopler** 

jcdopler@nchfa.com

919-981-5008

Dan McFarland

dnmcfarland@nchfa.com

919-875-3753



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