

## CHFA/DOH CONSOLIDATED APPLICATION FOR HOUSING DEVELOPMENT FINANCING

### ELECTRONIC SUBMISSION INSTRUCTIONS

#### **ACCESS TO THE APPLICATION**

The CHFA/DOH Consolidated Application for Housing Development may be accessed through the DOH or CHFA websites as an Excel file and is also available through the SharePoint website (available after requested access explained below)

[www.chfa.org](http://www.chfa.org)

[www.ct.gov/doh](http://www.ct.gov/doh)

#### **TECHNICAL PREREQUISITES**

In order for SharePoint to function correctly you must use Internet Explorer (version 10 or above) as your web browser. Other web browsers may limit functionality of both SharePoint and the Consolidated Application. In order for the Consolidated Application to function correctly, you must use Microsoft Excel 2010 (or newer). Older versions have limited functionalities, which may prevent portions of the Consolidated Application from working correctly.

#### **SETTING UP YOUR SHAREPOINT ACCOUNTS**

To create a SharePoint account (Valid email address is required):

1. Send email to [applicationrequest@chfa.org](mailto:applicationrequest@chfa.org) requesting creation of a SharePoint application site. In email request the following information must be provided:
  - a. Funding round/type (ex. CHAMP, 9% LIHTC, HTCC, SSHP, etc.)
  - b. Application/Project Name
  - c. Company Name
  - d. Primary Contact Name
  - e. Primary Contact Phone
  - f. Primary Contact Email
  - g. Email addresses of any additional users who need access
2. Allow 2-3 business days for website to be created
3. Receive application invitation email with access to application specific website
  - a. Applicants should open invitation email and log into SharePoint within 7 days of receipt, or the invitation email will expire and the applicant will have to request another be sent.
  - b. Check Spam folder in the event invitation email is not received in inbox folder.
4. Create a one-time (email specific) Microsoft Account with login information (see instructions below), if one had not been previously created
5. Should the SharePoint website need to be shared with additional team members whose email address was not on the original request, please email [applicationrequest@chfa.org](mailto:applicationrequest@chfa.org) with request.
6. Use the imbedded Consolidated Application (Microsoft Excel file) or upload a Consolidated Application that had been filled out (downloaded from the SharePoint website onto a computer). The Consolidated Application Version must be the same as what was imbedded into the SharePoint website when it was created for the applicant.

**SETTING UP YOUR MICROSOFT ACCOUNT**

All team members are required to have Microsoft Accounts in order to gain access to the SharePoint application submission website. Each team member only needs to create a Microsoft Account once per email address, which can be used for multiple applications. The steps to set up a Microsoft Account are as follows:

1. Receive an application invitation email (as noted in the instructions to set up a SharePoint account)
2. Click on the link in the email, and at the Microsoft login page, click the “Create A Microsoft Account” link
3. Fill in the information **making sure to use the same email for your Microsoft Account as you are for the SharePoint application website**
4. Verify your account via received email from Microsoft

Your account should be activated (after a brief period of time) and you can use the newly created Microsoft Account login information to log into SharePoint using the application invitation email previously received.

**SHARING YOUR SHAREPOINT APPLICATION SITE**

Submitting a complete application may require that different members of a development team upload certain documents.

In the SharePoint application website, development team members can be given access by the system administrator. To share the application website with additional team members:

1. Send request to [applicationrequest@chfa.org](mailto:applicationrequest@chfa.org), including email addresses of new members to be added (only if not submitted in original SharePoint Request).
2. If team members have not yet set up a Microsoft Account, they will have to do so prior to being able to access the SharePoint application site.

**NOTE:** It is important that invitation emails are not forwarded to other individuals, the site must be shared correctly to avoid back-end system confusion.

Applicants may request to add as many team members considered necessary to complete the document uploads for final submission.

**NOTE:** Development team members may be used by more than one Applicant and/or more than one application per Applicant. All development team members given access by the Applicant will have full access to all materials provided in the application including any organizational and/or financial information submitted with the application.

**COMPLETING THE CONSOLIDATED APPLICATION**

The Consolidated Application has a number of tools and functions built into it to make using it easier for applicants. There are a number of drop down fields, data tables, and checkboxes to provide specific information about the project. The version of the Consolidated Application that is submitted must be the same as what was originally imbedded into the SharePoint website upon creation. If a version different than what was originally available through the SharePoint website is submitted, it may not be considered for approval, or it may be considered a missing Threshold requirement. The application can be completed by following these steps:

1. On the Exhibit Checklist worksheet, click the “Core Items” button, followed by the funding source buttons for which you will be applying. Doing this will hide any information/worksheets that are not necessary to be submitted for that type of funding.

2. Review the Exhibit Checklist and complete any exhibits listed as Threshold for the type of funding for which you will be applying. The applicant is responsible to make sure all Threshold items are completed and submitted.
3. The Consolidated Application workbook can be completed and submitted a number of ways including:
  - a. Downloaded from the SharePoint website, completed, and uploaded back to SharePoint (recommended method).
  - b. Downloaded from the CHFA or DOH websites (as long as it is the same version number as what was originally available through SharePoint), completed, and uploaded to SharePoint.
  - c. Through the file imbedded into the SharePoint website

**NOTE:**

- Microsoft updated their security protocols and disabled macros in files from the internet. The workaround to enable macros is to download and save the ConApp to your computer and then open it from there.
- If the Consolidated Application has been “Checked Out” of SharePoint, it will be unavailable to other team members until it has been “Checked In.”

**COMPLETING/USING SUPPLEMENTAL ATTACHMENTS**

A number of attachments referenced in the Consolidated Application are available on the SharePoint, CHFA, and DOH websites. These items should be completed in their entirety (or risk being considered incomplete) using the latest version and submitted per the Threshold requirements listed on the Exhibit Checklist of the Consolidated Application. They can be saved directly to the SharePoint website, or uploaded, after they have been completed, in the appropriate File Upload folder(s)/location(s). Please keep the file names as brief as possible (rename if necessary).

**UPLOADING APPLICATION AND ATTACHMENTS**

*All applications must be submitted electronically through the SharePoint website.* Complete application workbooks may be uploaded in their entirety. Exhibits and attachments should be titled, converted to PDF files, and uploaded in the appropriate section folders as available on the SharePoint website. The attachment folder list available on the SharePoint website contains the sequential naming convention from the application’s Exhibit Checklist to assist in keeping application materials in consistent order. The applicant is responsible to make sure all Threshold requirements are included, there are no warnings built into SharePoint for missing items. Please abbreviate the attachment file names as much as possible.

**NOTE:** ***NO portion of the application will be accepted via email.*** All electronic submissions must be completed through the SharePoint website.

**SUBMITTING MULTIPLE APPLICATIONS BY ONE APPLICANT**

Applicants may submit multiple applications per funding round. Applications will be named by the development name as provided in the SharePoint access request email. A separate SharePoint site will be required for each application submitted.

**SIGNATURE PAGES**

The following pages/exhibits/attachments from the application must be signed and submitted if they are listed as a Threshold requirement for the respective funding round:

1. Application
2. Exhibit 4.5.b – DOH CEPA Intake Form
3. Exhibit 4.9.c – Exploded Trade Payment Breakdown
4. Exhibit 4.9.e – Project Cost Summary

5. Exhibit 4.11 – Program Guideform: Relocation Assistance Plan
6. Exhibit 5.2.a – Detailed Income & Expenses Form
7. Exhibit 8.1.a – NEPA Statutory Checklist
8. Exhibit 8.1.b – NEPA Environmental Assessment Checklist
9. Exhibit 10.1 – Certifications
10. Exhibit 10.2 – Notice to Executive Branch State Contractors and Prospective State Contractors of Campaign Contribution and Solicitation Limitations - Contractors of Campaign Contribution and Solicitation Limitations (“SEEC 10”) – signed and notarized
11. Exhibit 10.3 – Affirmative Action Policy Statement
12. Exhibit 10.4 – Fair Housing Policy Statement
13. Exhibit 10.5 – Certification to Affirmatively Further Fair Housing
14. Exhibit 10.6 – HTCC Certification
15. Exhibit 10.7 – Architect Certification
16. Exhibit 10.8 – Housing Consultant Certification

Applicants must sign and subsequently create one PDF document of these signature pages and upload as “Signatures Attachment,” in the Miscellaneous upload folder on SharePoint.

**NOTE:** For application sections completed by contracted professional services the “Prepared by,” and “Company Name/Firm” cells must be completed in lieu of signatures.

#### **HARD COPY REQUIREMENTS**

For CHFA funding, applicants are required to submit the CHFA Application Fee (Certified Bank Check) in hard copy to CHFA. Hard copy materials must be sent to CHFA at:

Connecticut Housing Finance Authority  
999 West Street  
Rocky Hill, CT 06067  
Attn: Multifamily Housing Development

#### **ELECTRONIC SUBMISSIONS REQUIREMENTS**

All applicants are required to submit all other materials, including Plans & Specifications, electronically through the SharePoint website. Plans and Specifications must be uploaded to the appropriate File Upload folder. Hard Copy submissions are unacceptable, and nothing (unless specifically requested by CHFA or DOH) should be submitted via email.

#### **COMPLETING SUBMISSION**

Applicants will complete their electronic submission by making sure all the items in the Task List section of SharePoint are checked as completed, including the “Ready for Review” item. Once the “Ready for review” is selected and application is submitted, no additional documents may be uploaded until the website is re-opened for clarification updates (if a clarification period is available for that type of application). If all of the Task List checkboxes are not checked as completed by the submission cutoff time, the website will be locked automatically, no additional changes will be allowed, and the application will be submitted as is.

#### **QUESTIONS**

Questions may be submitted at any time to [applicationrequest@chfa.org](mailto:applicationrequest@chfa.org).