

# Essential Single Family Rehabilitation (ESFR) Loan Pool Portal

## Unit Monitoring



7/23/2021

## Review of Portal Basics

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

- Website: <https://www.nchfa.org/LPPortal>
- 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.

## 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.



# Loan Pool Portal

## Announcements

No announcements right now...

## Inbox

Show  entries

SFRLP1821: Request Document

Please upload documents for monitoring  
— Mark Lindquist  
7/14/21 2:41 PM

## Important Dates

Coming Soon!

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.**



# Loan P

- Awaiting Reservation Submission 4
- Awaiting Settlement Data Sheet Submission 11
- Awaiting Requisition Request Review 0
- Awaiting Unit Completion Report 0
- Awaiting Funding Agreement Modification Completion 0
- Awaiting Monitoring Document Upload 1**

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

### Awaiting Monitoring Document Upload

Show 10 entries

Search:

	Program	Program Cycle	Agency Project Number	Project Number	Borrower	Member	Address	Monitoring FR Status	Monitoring PI Status
	SFRLP	2018	9236917-004	SFRLP1822	efdasew, kbilyego a.	Piedmont Triad Regional Council	254 Beaver Dr	Request Documents	Not Selected

Showing 1 to 1 of 1 entries

Previous 1 Next

## 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

- Income Statement must be uploaded
- Repair Bid must be uploaded
- Lead-based Paint Disclosure - required if before 1978 must be uploaded
- Bid Opening Tally must be uploaded
- Preconstruction Conference Record must be uploaded
- Construction Contract - Required there are any must be uploaded
- Release of Lien Authorization must be uploaded
- Inspection Reports - Progress inspection prior to approval of payment must be uploaded
- Radon Test Report must be uploaded
- Lead Requirements Worksheet must be uploaded
- SFRLP Application for Assistance must be uploaded
- Member's Cost Estimate must be uploaded
- Essential Property Standards Checklist must be uploaded
- Essential Property Standards Certification of Compliance must be uploaded
- Certification of Final Inspection must be uploaded
- Record of Contact must be uploaded

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**


Actions

 Submit Monitoring Documents

Review and Submit

This Set of Monitoring Documents has passed all checks and is ready for submission

 Documents 

 Submit



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.



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## Special note:

- “See slides 15-17 on the recently updated “Partner Portal: Invoices and Requisitions” guide located at [www.NCHFA.com](http://www.NCHFA.com), ESFRLP, Forms and Resources.”

## Portal Problems?

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

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