

Essential Single Family Rehabilitation (ESFR) Loan Pool Portal

Funding Agreement Modification



NORTH CAROLINA

HOUSING
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AGENCY

www.nchfa.com

Review of Portal Basics

All ESFR Funding Agreement Modifications are processed 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. We won't know your password, but can reset it.
- Messages come to everyone with a login by default.

Who Should Be Logging In?

- Personnel will be granted portal access as either a
 - General user able to reserve units, upload Invoices, designate line items and create Requisitions, or as a
 - Signing Authority with additional authorization to approve Invoices and Requisitions along with general user permission, or as a
 - Contract Signing Authority (CSA) to approve Funding Agreement Modifications
 - The Contract Signing Authority must have the right to obligate their organization contractually (i.e. Executive Director, County Manager).

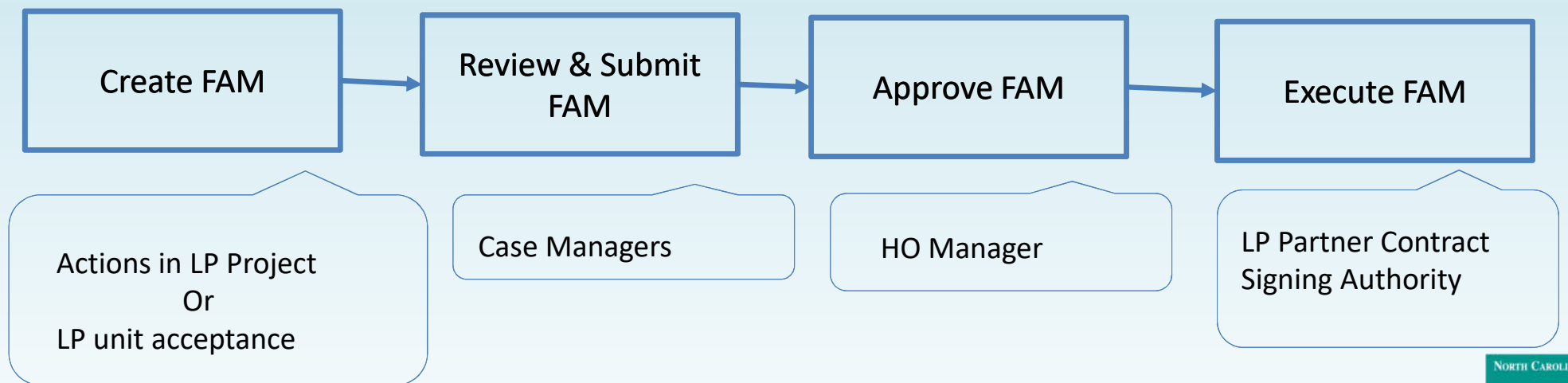
Process Overview


All ESFR Funding Agreement Modifications (FAM) are processed through the ESFR Loan Pool Portal (Portal) as follows:








1. Once a reservation is submitted that will reserve funds over the initial Funding Agreement amount of \$190,000 or \$175,000, a FAM will be created, reviewed and approved by NCHFA.
2. A message will be sent to the CSA to review and complete or return the FAM.
 - If Completed, the new reservation can be approved.
 - If Returned, any new reservations cannot be approved.
3. A FAM will be created and will need to be completed by the CSA for every unit over the initial Funding Agreement.*

*Notify your case manager if you intend to add several units in a very short period but would like only one FAM. Be aware that fund disbursement may be affected during this period.

ESFRLP FAM Workflow process



| | | |
|-------------------------------|---|--|
| <p>SFRLP Test1 Tester</p> | <p>SFRLP1823 123 main st Troy, NC 27371 - Montgomery County</p> | <p>9236919-006</p> <p>Unit Settings </p> <p>Pending Setup</p> <p>Enter Reservation</p> |
|-------------------------------|---|--|

| | |
|--|---|
| <p>Menu</p> <ul style="list-style-type: none">  Dashboard  Borrower   Co-Borrower   Property  | <p>Review and Submit</p> <p>This Reservation has passed all checks and is ready for submission</p> <p>Total project amount may exceed current Funding Agreement amount if this unit is submitted. Approval by NCHFA of a Funding Agreement Modification may be required.</p> |
|--|---|

When submitting a new reservation, this warning will appear. This will notify NCHFA to create the FAM with the updated funding amount.



Project Details



| | | | |
|-------------------------|---------------------------------|--------------------------|---|
| Organization: | Piedmont Triad Regional Council | Project Number: | SFRLP1823 |
| Project Manager: | Donna Coleman | Project Name: | Piedmont Triad Regional Council-Montgomery-2018 |
| Awarded Amount: | \$175,737 | Disbursed Amount: | \$737 |
| Project Status: | Active | | |

Funding Agreement Modification

| Amount | Date Submitted | Submitted By | Date Reviewed | Date Approved | Date Completed | Date Cancelled |
|-----------|----------------|--------------|---------------|---------------|----------------|----------------|
| \$175,737 | 07/29/2020 | Mike Handley | 07/29/2020 | | | |

The FAM process can be checked in the portal.

Announcements

No announcements right now...

Inbox

Show entries

SFRLP1823: The Funding Agreement Modification process has begun and needs execution

The Funding Agreement Modification has been approved by NCHFA to increase the Funding Limit for this project from \$175,000 to \$175,737 Please complete the funding agreement modification by executing «click for more»

— Mike Handley
7/29/20 9:54 AM

Important Dates

Coming Soon!

An email will be sent to the CSA and there will be a message in the portal to complete the FAM

Awaiting Funding Agreement Modification Completion

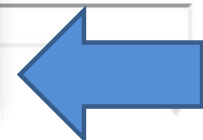
Show 10 entries

| Project Number | Project Name | Current Amount | Amount | FAM Reason |
|---|---|----------------|-----------|----------------------------------|
|  SFRLP1821 | Piedmont Triad Regional Council-Alamance-2018 | \$519,558 | \$529,558 | FAM created for unit 9236916-002 |

Showing 1 to 1 of 1 entries

Previous 1 Next

- Awaiting Reservation Submission 4
- Awaiting Settlement Data Sheet Submission 26
- Awaiting Requisition Request Review 1
- Awaiting Unit Completion Report 0
- Awaiting Funding Agreement Modification Completion 1**



Look in the briefcase for Awaiting Funding Agreement Modification Completion to access the FAM. Click the blue box to the left of the Project Number to review the FAM.

Actions

- [⚡ Complete FAM](#) ←
- [⚡ Return FAM](#)

Project Details 🖨️

Organization: Piedmont Triad Regional Council

Project Manager: Donna Coleman

Awarded Amount: \$175,737

Project Status: Active

Project Number: SFRLP1823

Project Name: Piedmont Triad Regional Council-Montgomery-2018

Disbursed Amount: \$737

Current Funding Agreement Modification

Current Funding Agreement Amount: \$175,000

Proposed Funding Agreement Amount: \$175,737

Funding Agreement Modification Reason: FAM created for unit 9236919-006

Funding Agreement Modification

| Amount | Date Submitted | Submitted By | Date Reviewed | Date Approved | Date Completed | Date Cancelled |
|-----------|----------------|--------------|---------------|---------------|----------------|----------------|
| \$175,737 | 07/29/2020 | Mike Handley | 07/29/2020 | 07/29/2020 | | |

The CSA will review the FAM and select Actions-Complete FAM to approve or Return FAM to reject.

Complete FAM

Are you sure you want to complete the Funding Agreement Modification?

Complete **Cancel**


Select Complete. Any pending units cannot be approved until the FAM is completed.

Project Details

Organization: Piedmont Triad Regional Council
Project Manager: Donna Coleman
Awarded Amount: \$175,737
Project Status: Active

Project Number: SFRLP1823
Project Name: Piedmont Triad Regional Council-Montgomery-2018
Disbursed Amount: \$737

Funding Agreement Modification

| | Amount | Date Submitted | Submitted By | Date Reviewed | Date Approved | Date Completed | Date Cancelled |
|---|-----------|----------------|--------------|---------------|---------------|----------------|----------------|
|  | \$175,737 | 07/29/2020 | Mike Handley | 07/29/2020 | 07/29/2020 | 07/29/2020 | |

Announcements

No announcements right now...

Inbox

Show entries

SFRLP1823: Unit Conditional Approval

Your unit has been conditionally approved. The next step is to submit a settlement data sheet.

— Mike Handley
7/29/20 10:16 AM

Important Dates

Coming Soon!

After the FAM is completed by the CSA, the pending unit can be accepted for title search and environmental review. Once approved an email will be sent along with a message in the portal.

Portal Problems?

If you have any problems with portal operations or any stage of the Funding Agreement Modification process, please contact:

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