

insight quick step user guide



March 2019



chfa[®]

*financing the places where
people live and work*

insight quick step user guide

introduction and table of contents

introduction

Insight is a web-based application that allows CHFA's multifamily property owners, management agents, and business finance customers secured access to property, loan, and contact information.

External customers will initially log into the application with a user ID assigned by the system administrator and a system-generated password, which may be later changed by the user.

The latest version of Insight offers the same great account maintenance functionality in a more user-friendly format.

Enhancements include:

- New design and navigation features to easily find information
- Expanded browser compatibility to include Google Chrome, Firefox, Safari, in addition to Internet Explorer

For more information, please contact us at cssupport@chfainfo.com.

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1. log in

To log into Insight, enter in your user name and password and press the “Log In” button. You can also recover your username and reset your password if you have forgotten them. If you are a new user to Insight and do not have a username/password, click on the “request a new user account” link.

insight chfainfo.com

chfa. insight

User Name

Password

Log-In

New to Insight?
If you are new to Insight, you can [request a new user account](#). Once your account is created, return here to login.

Forgot Your Password?
If you have forgot your password or password expired, please [click here](#) to reset your password.



Forgot Your User Name?
If you have forgotten your user name [click here](#) to recover your user name.

For more information, please contact support at cssupport@chfainfo.com or 303.297.CHFA (2432)

colorado housing and finance authority

1981 Blake Street Denver, Colorado 80202	348 Main Street Grand Junction, Colorado 81501
303.297.chfa (2432) 800.877.chfa (2432) toll free 800.659.2656 tdd	970.241.2341 800.877.8450 toll free

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With respect to its programs, services, activities, and employment practices, Colorado Housing and Finance Authority does not discriminate on the basis of race, color, religion, sex, age, national origin, disability, or any other protected classification under federal, state, or local law. Requests for reasonable accommodation, the provision of auxiliary aids, or any complaints alleging violation of this nondiscrimination policy should be directed to the Nondiscrimination Coordinator, 1.800.877.2432, TDD/TTY 800.659.2565, CHFA, 1981 Blake Street, Denver, Colorado 80202-1272, available weekdays 8:00am to 5:00pm.

2. home page

Your home page will differ depending on what type of customer you are (business finance vs. multifamily). You may filter your display list by the info listed in the columns. To view more information for a property or a loan, hover over the action icons to see the name of the page you will be navigated to, then left click.

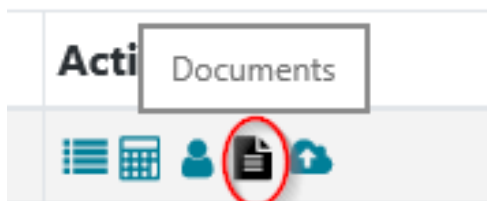
Property Number	Actions
9Z01-33	    
Actions	
   	
   	

3. reviewing documents

Various property documents are available to view and download from Insight, including:

- Previous Annual Submissions
- Governing Documents (LURA, CHFA Regulatory Agreement, etc.)
- Management Review reports
- Reserve Account statements
- Section 8 voucher and contract documents

- a. Documents are viewable by individual property. To the right of the Property Number, click the “Documents” icon under Actions.



- b. In the “property documents” window that opens, you may select a group of documents from the drop-down menu, or search for a specific document in the Search box. Once a list of documents appears, click on the document Name in blue to open the document.

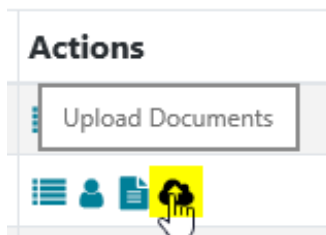
The screenshot shows a window titled "property documents" with a search bar and a table of results. The search bar contains "AM-Submissions" and "Find a Document". The table has columns for Group, Type, and Name. The Name column contains document titles with dates, such as "2013 - am-owner cert cont prog compl - 1/15/2014 -". The window also includes pagination controls showing "Showing 43 to 49 of 51" and a "Close" button.

Group	Type	Name
AM-Submissions	AM-Owner Cert Cont Prog Compl	2013 - am-owner cert cont prog compl - 1/15/2014 -
AM-Submissions	AM-Owner Cert Cont Prog Compl	2014 - am-owner cert cont prog compl - 1/27/2015 -
AM-Submissions	AM-Owner Cert Cont Prog Compl	9z00-609 - 2015 - am-owner cert cont prog compl - 1/20/2016 -
AM-Submissions	AM-Owner Cert Cont Prog Compl	9z00-609 - 2016 - am-owner cert cont prog compl - 1/12/2017 -
AM-Submissions	AM-Owner Cert Cont Prog Compl	9z00-609 - 2017 - am-owner cert cont prog compl - 1/11/2018 -
AM-Submissions	AM-Owner Cert Cont Prog Compl	9z00-634 - 2007 - am-owner cert cont prog compl - 6/18/2008 -
AM-Submissions	AM-Owner Cert Cont Prog Compl	9z00-634 - 2007 - am-owner cert cont prog compl - 6/18/2008 -

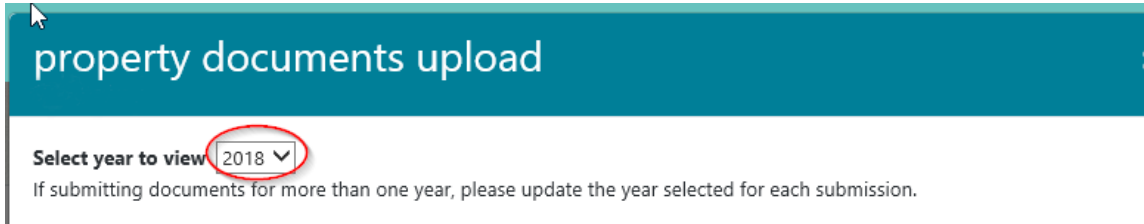
4. uploading a compliance report

Uploading a compliance report (e.g., Annual Owner Certification, IRS form 8609, audited financial statements):

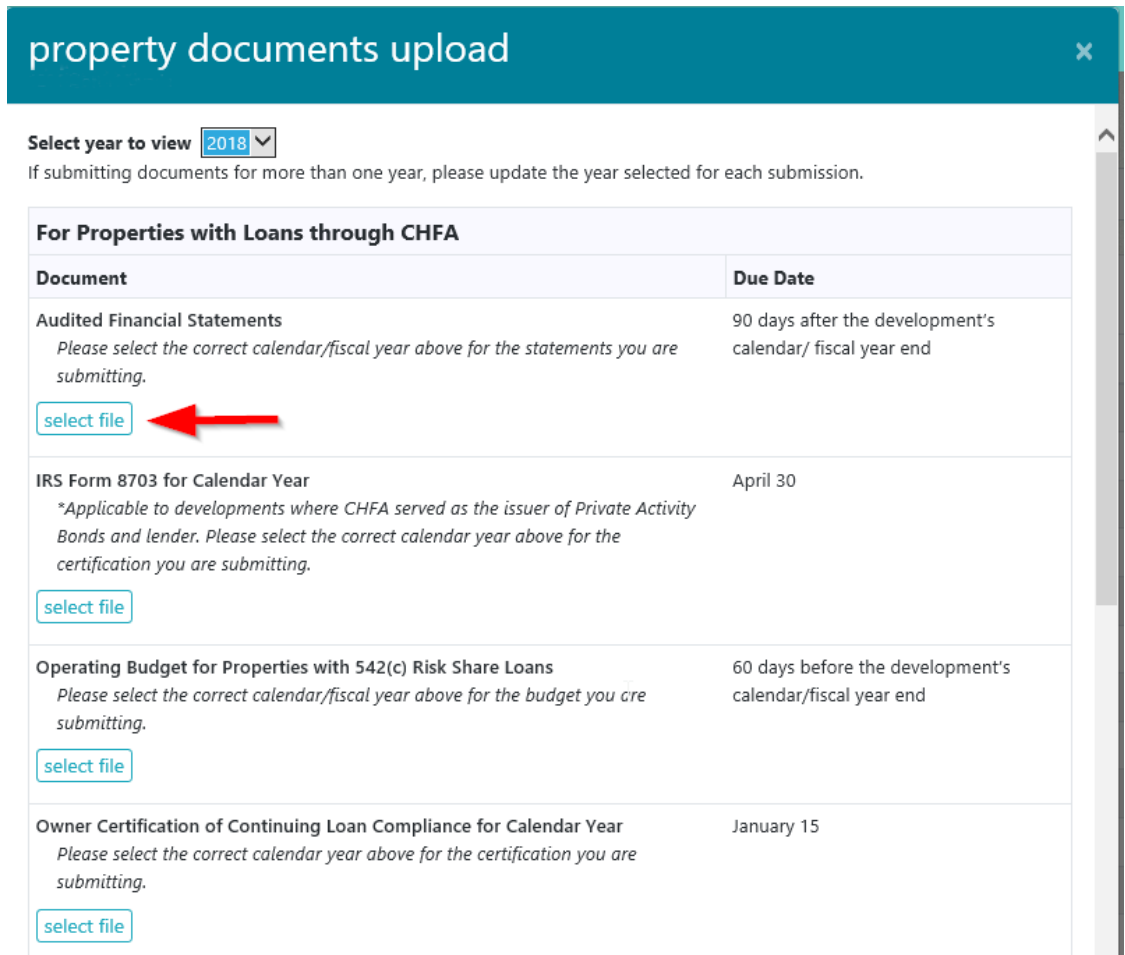
- a. Reports are uploaded by individual property. Scroll down to find the property for which the report is being submitted. To the right of the Property Number, click the “Upload Documents” icon.



- b. In the “property documents upload” window, select the “year to view” that applies to the report you are submitting. For example:
 - i. To submit an owner certification for the compliance period January 1 to December 31, 2018, select 2018.
 - ii. To submit a budget for fiscal year 2020, select 2020.



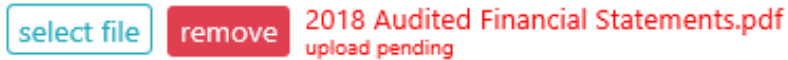
- c. The window will load a list of compliance report types and due dates by program. Scroll down to find the applicable program (CHFA loan, LIHTC, or RTC).
- d. Within each program group is a list of document types. For the Document type you are submitting, press the “select file” button.



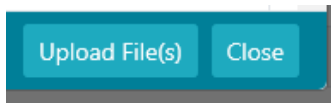
- e. A "Choose File to Upload" window will open. Navigate to your report, highlight it, and click "Open."
- f. Your report will now appear in red in the "Property documents upload" window with a status of "upload pending."

Audited Financial Statements

Please select the correct calendar/fiscal year above for the statements you are submitting.



- g. To upload to CHFA, click "Upload File(s)" at the bottom of the window. Once the upload is complete, the report will appear in green with a status indicating the upload date and time.



property documents upload ×

File(s) have been successfully uploaded.

Select year to view 2018 ▼

If submitting documents for more than one year, please update the year selected for each submission.



Document	Due Date
Audited Financial Statements <i>Please select the correct calendar/fiscal year above for the statements you are submitting.</i>	90 days after the development's calendar/ fiscal year end
select file 2018 Audited Financial Statements.pdf upload on 3/14/2019 1:41:46 PM	
IRS Form 8703 for Calendar Year <i>*Applicable to developments where CHFA served as the issuer of Private Activity Bonds and lender. Please select the correct calendar year above for the certification you are submitting.</i>	April 30
select file	
Operating Budget for Properties with 542(c) Risk Share Loans <i>Please select the correct calendar/fiscal year above for the budget you are submitting.</i>	60 days before the development's calendar/fiscal year end
select file	
Owner Certification of Continuing Loan Compliance for Calendar Year <i>Please select the correct calendar year above for the certification you are submitting.</i>	January 15
select file	

- h. Once your report is uploaded, the Program Compliance Officer assigned to that property will receive a notice of the submission with 24 hours.
- i. Remember: if submitting reports for different years, update the “year to view” dropdown selection at the top of the “property documents upload” screen.

5. making a loan payment

- a. Click on the “Make a Payment” icon and enter in all required fields in the “Submit Loan Payment” window then press “Submit Payment” button.

loans

Loan Number	Type	Balance	Next Due Date	Total Payment Due	Officer	Make a Payment
000654321	BF EDF	\$649,652.03	8/1/2018	\$9,142.06	Rhonda Housden	
0000123456	BF NON PROFIT REAL ESTATE	\$920,487.21	8/1/2018	\$6,356.72	Rhonda Housden	

submit loan payment ✕

000654321

payment details * Indicates required fields.

Current Due \$1,073.95
on 08/01/2018

Late Fee \$0.00

Total Payment:* \$1,073.95

bank details

Bank Name*

Routing Number* **Confirm Routing Number***

Account Number* **Confirm Account Number***

Account Type Checking Savings [Locate Checking Account# and Routing#](#)

contact info

Person Paying* **Phone Number***

Email Address* **Confirm Email Address***

*I agree to the [Terms and Conditions](#)

- b. When the payment confirmation window appears, verify that the information is correct and then press the "Make Payment" button. If changes need to be made, click on the "Back" button to navigate back to the previous window. An email verifying that the payment was completed will be sent to the email address that was entered in the contact info section.

submit loan payment
✕

payment confirmation

Total Payment	\$1,073.95
Bank Name	CHFA
Routing Number	000067894
Account Number	12345
Person Paying	Jane Doe
Contact Phone	303-297-7432
E-Mail Address	janedoe@chfainfo.com

Please review the payment information. If it is correct, please press the 'Make Payment' button to submit the payment. If there are any issues with the payment, CHFA will contact you.

Thanks for using ePay.

Back
Make Payment

Close

The screenshot shows a web browser window with a modal dialog box titled "submit loan payment" (ID: 0000323006). The modal content includes a "payment complete" message, a thank you note, and a list of instructions: a confirmation email will be mailed, a second email with a reference ID will be sent, NSF fees of \$50.00 will be charged if funds are insufficient, and payments may be suspended. It also provides an email address for recurring payments: cssupport@chfainfo.com. The background shows a sidebar with a list of properties and a table of loans.

Loan Number	Type	Balance	Next Due Date	T
0000322990	S42 (C)	\$3,539,111.66	8/1/2018	\$
0000323006	HOF CHFA	\$234,426.39	8/1/2018	\$



Dear Jane Doe,

Thank you for using CHFA ePay.

Your payment for loan #XXXXXX9212 was submitted. The reference number for your payment is #323287. Please note that it may ta

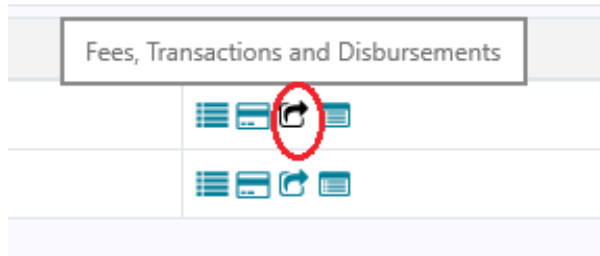
If you would like to set up an automated recurring monthly (ACH) payment, please email cssupport@chfainfo.com with your request.

If you should have additional questions, please call 1-800-877-CHFA (2432) and ask for a Commercial Loan Servicing Representative


6. exporting transaction history

To review and export transaction history please follow these steps:

- a. From the loan grid click on the “Fees, Transactions and Disbursements” icon.



- b. Click on the green export button.

All Transactions			Export 
Date	Amount	Type	
07/10/2018	\$4,248.08	Principal Billing	
07/10/2018	\$19,170.19	Interest Billing	
07/10/2018	\$2,291.51	Replacement Reserve Account Deposit	
07/10/2018	\$578.17	Hazard Insurance Assessment	
07/10/2018	\$924.61	Hazard Insurance Assessment	

- c. Loan transaction data will be exported. Latest 24 months’ worth of transactions are available for export.

	A	B	C	D
1	TransactionDate	TransactionType	TransactionAmount	
2	7/10/2018	Principal Billing	4248.08	
3	7/10/2018	Interest Billing	19170.19	
4	7/10/2018	Replacement Reserve Account Deposit	2291.51	
5	7/10/2018	Hazard Insurance Assessment	924.61	
6	7/10/2018	Hazard Insurance Assessment	578.17	
7	7/10/2018	Tax Assessment	2981.55	
8	7/10/2018	MI Assessment	739.48	
9	7/3/2018	Principal Payment	4225.2	
10	7/3/2018	Interest Payment	19193.07	
11	7/3/2018	Hazard Insurance Payment	578.17	
12	7/3/2018	Hazard Insurance Payment	924.61	
13	7/3/2018	TAX PAYMENT	2981.55	
14	7/3/2018	MI PAYMENT	739.48	
15	7/3/2018	Replacement Reserve Account Payment	2291.51	
16	7/3/2018	Reserve Interest	12.73	
17	6/9/2018	Principal Billing	4225.2	
18	6/9/2018	Interest Billing	19193.07	
19	6/9/2018	Replacement Reserve Account Deposit	2291.51	
20	6/9/2018	Hazard Insurance Assessment	578.17	

5. assistance

If you have any questions about Insight, please contact your CHFA Commercial Loan Servicing representative, CHFA Compliance Officer, or email cssupport@chfainfo.com.

With respect to its programs, services, activities, and employment practices, Colorado Housing and Finance Authority does not discriminate on the basis of race, color, religion, sex, age, national origin, disability, or any other protected classification under federal, state, or local law. Requests for reasonable accommodation, the provision of auxiliary aids, or any complaints alleging violation of this nondiscrimination policy should be directed to the Nondiscrimination Coordinator, 1.800.877.2432, TDD/TTY 800.659.2656, CHFA, 1981 Blake Street, Denver, Colorado 80202-1272, available weekdays 8:00am to 5:00pm.

denver

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