CAA Updates

MaineHousing
Maine State Housing Authority

Electronic Submission of Common Home Project Documents to MaineHousing

Assumptions:

- MaineHousing and CAA staff will use ShareFile to electronically transmit Common Home project documents. **Do not mail hard copies of project documents to MaineHousing.**

- ShareFile emails a "Notification Summary" to EHS staff whenever an agency uploads a file through ShareFile. The ShareFile Notification Summary will serve as the date received record for each submission.

  Refer to the Program Guidelines for more detailed information.

How it works:

1. Scan and save executed project documents as a bundle. *Please include the client name as part of the file name.*

2. Enter ShareFile and *upload* the bundle (file) to securely transmit to MaineHousing. *That's it! EHS will take it from there.*

3. EHS staff receives email notification when a file is uploaded to ShareFile folders. Karen Vigue goes into the agency's ShareFile folder, downloads and bookmark the documents to put on MaineHousing's server for review/processing by EHS staff. Once client file is downloaded off ShareFile:

   a. The file is moved to the "Processed by MaineHousing" subfolder within the agency's ShareFile folder; and a note is added to each file with the process date. *See the yellow icon to the far right of each file title.*

   b. The objective is to have only new project files in the agency's ShareFile folder. The subfolder "Processed by MaineHousing," was created solely to move processed files out of your main ShareFile folder and still preserve some kind of history that files has been transmitted to MaineHousing.

   MaineHousing cannot finance projects if any Phase 1 and/or Phase 2 documents are missing from the bundle.

Submit the following documents to MaineHousing as a bundle to finance of a project:

Phase 1

- Phase 1 Document Checklist
- Phase 1 Invoice
- Waivers (if any)
- Application
- Proof of Income (3 months of paystubs, 3 months of bank statements)
- Proof of Ownership (Property Deed, bill of sale)
- Property Tax Report (tax bill)
- Grant Agreement
- Construction Escrow Agreement
- Construction Contract
- Final Job Specification (cover page)
- Job Specifications (Appendix A)
- Property Inspection Form (WSD Standards)
- Energy Audit (if applicable)
- Floodplain Map
- Digital color photographs

Phase 2

- Phase 2 Document Checklist
- Phase 2 Invoice
- Change Orders (if any)
- Contractor Payment request (with invoices)
- Certificate and Release of Liens
- Certificate of Final Inspection
- Lead Dust Wipe Sample Report (if any)
- Digital color photographs

Refer to the Program Guidelines for exceptions pertaining to emergency projects.

Using Web-Access Forms:

The objective of creating pdf writable forms and bundles is to provide a seamless experience for clients, while providing efficient processing and cost savings for the agencies. Documents can be accessed through most any electronic devise, allowing technician access to documents and information they would otherwise have to carry in hard copy.

Suggestion: Staff can open and save a form or bundle faster than writing down the information on paper. Input data on the HRN Application or Bundle cover sheet as part of the initial client contact, print and then send to client for completion/signature.

Important Note: Do not save blank forms on your computer for future use. MaineHousing will be tweaking and updating the forms as we become aware of typos, form fields not properly calculating, etc. Always obtain documents for each project from the CAA Portal.

The browser is not designed to retain data. Once the document is open on your browser, "save as" and give the blank document a file name, which should include the client's name.

Document Checklists

The Phase 1 and Phase 2 Document Checklist serves as guidance for both document submission and setting up a project file. Agencies do not need to send MaineHousing documents not pre-checked on the Checklist. *Retain the original signed documents in the agency's file.*

The Document Checklists also specifies the file sections and document order that agencies should arrange documents in each project file. This will provide consistency throughout the agencies for auditors.