



## Entry Form 2017 Annual Awards for Program Excellence

**Entry Deadline: Thursday, June 15, 2017, Midnight ET**

Each entry must include a completed entry form. Please complete a form for each entry your HFA is submitting. The completed entry form will become the first page of your entry.

This form is a fillable PDF. Type your information into the entry form and save it as a PDF. Please do not write on or scan the entry form. **Questions: Call 202-624-7710 or email [awards@ncsha.org](mailto:awards@ncsha.org).**

**Entry Title:** Enter your entry's title exactly as you wish it to be published on the NCSHA website and in the awards program.

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**Category:**

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**Subcategory:**

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**Entry Summary:** A 15-word (max) summary of the program, project, or practice you are entering.

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**HFA:**

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**HFA Staff Contact:**

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**Phone:**

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**Email:**

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### Visual Aids:

Are you mailing to NCSHA 10 copies of any visual aids that cannot be included in your entry PDF?      Yes      No

### Payment:

My HFA is mailing a check to NCSHA.

My HFA is emailing the credit card authorization form to [awards@ncsha.org](mailto:awards@ncsha.org).

**2017 NCSHA Annual Awards for Program Excellence**  
**Wisconsin Housing and Economic Development Authority (WHEDA)**  
**Management Innovation| Operations**  
**eWHEDA Financial Portal**

Background

WHEDA developed a new, secure online application to help its customers manage their multifamily financing activity. The new financial portal, accessible via our public website wheda.com, enables WHEDA customers to electronically access monthly and year-end loan statements. The new online app improves customer service, accuracy and timeliness as well as eliminates printing and mailing paper statements to WHEDA multifamily borrowers.

Previous Business Environment

WHEDA's Loan Servicing Program Specialists produce hard copies of monthly statements and mail the statements to multifamily borrowers. On an annual basis, year-end statements are printed for all customers and placed in the mail. Additionally, the Loan Servicing Program Specialists field calls for requests of year-end statements from auditors.

New Business Environment

WHEDA customers would request access to the eWHEDA financial portal via a Delegated Administrator Agreement. Upon completion of the agreement, WHEDA creates a unique login for the customer specific delegated administrator (DA). The DA then creates accounts for their internal users. The multifamily customer, via their designated users, has access to their specific monthly and year-end statements in a secure environment.

Results

The goal of the project was to reduce WHEDA's hard and soft costs for production of monthly statements and year-end statements. There are currently 485 outstanding WHEDA loans, managed and owned by 136 unique entities. The eWHEDA financial portal was launched December 30, 2016. Since the launch, the following operational savings have been realized?

- 485 statements are produced on a monthly basis. They are printed and mailed by WHEDA staff. PDF versions of the statements are saved on the network. Hard costs are approximately \$75/month (paper, envelopes, and postage).
- Annual statements are produced in January. They are printed and mailed by WHEDA staff. PDF versions are saved on the network. Hard costs are approximately \$275 (paper, envelopes, postage)
- Auditor requests of annual statements are also produced in January and February as requested. Approximately 300 requests come in from auditors. These requests are not printed. Instead they are PDF'd and emailed to the auditor requesting them. Through the DA agreement, customers can provide auditors with access to this information.

- On average, each statement produced whether by paper or electronically, takes 2-3 minutes of combined staff time. Approximately 220-330 hours of staff time is projected to be saved with the new online portal.
- Customer satisfaction has been increased as customers no longer need to wait for their statements to arrive via U.S. Mail.

#### Summary

Using internal IT and business unit specific resources, WHEDA has been able to realize significant operation cost savings and an increase customer satisfaction as a result of implementing its new eWHEDA financial portal.

#### Visual aids provided

- Customer instructions for the eWHEDA financial portal, including app screen shots



# WHEDA

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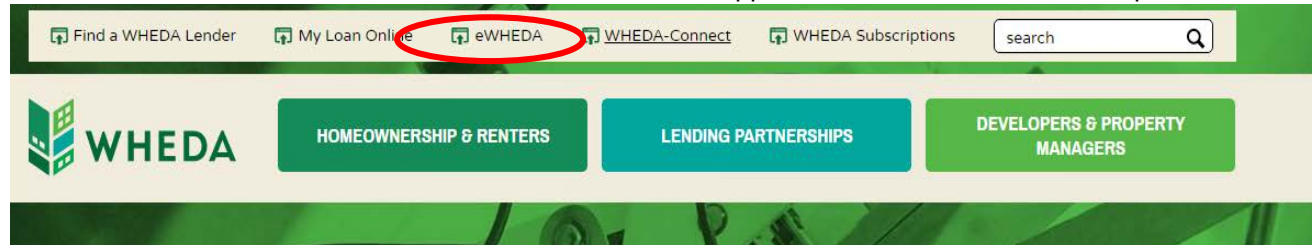
## Instructions for eWHEDA's Financial Portal Web Application

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## Accessing the System

1. Access the Internet through your Internet Service Provider (ISP). WHEDA supports the Internet Explorer browser only.
2. Enter wheda.com in the **Address** line. The link to eWHEDA applications can be found on the top menu bar and is labeled “eWheda login”.



3. Login with your user name and password. Your password is case sensitive. If you do not have a user name and password, please contact the delegated administrator for your agency and they can create one for you. If you agency is new to WHEDA or your delegated administrator has

left your agency, click on the blue hyperlink [How to Sign Up for Our eWHEDA Services](#) to obtain one.



**eWHEDA SERVICES**

To access eWHEDA Services, you need to provide your **username** and **password**.  
If you need assistance, please contact WHEDA Online Support  
at **800.334.6873**

[How to Sign Up for Our eWHEDA Services](#)

**Username:**

**Password:**

[Forgot your password?](#)

**\*\*Note:** This Login is for our Business Partners - If you have a WHEDA home mortgage  
please log in at WHEDA.com from the [Homeowners Page](#).

**Terms of Use**

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You may not modify, copy, distribute, transmit, display, perform, reproduce, publish, license, create derivative works from, transfer, or sell any information obtained from the wheda.com site.

4. Once logged in, you will see the **Available Applications** screen. It will look similar to the screen below. You most likely will not have this many options.
5. Click on **Financial Portal** from the **Available Applications** menu.



Available Applications

APPLICATION NAME	DESCRIPTION
▶ <a href="#">FORM500</a>	Multifamily Reserve Disbursement Requests
▶ <a href="#">MFFP</a>	FINANCIAL REPORTING SYSTEM (Billings, Year End Statements, Activity Statements)

\* Only these applications for which you are an approved user are shown here. If you are a WHEDA partner and need access to an application not shown, contact your Delegated Administrator or call 1-800-334-6873.

[HOME](#) [EDIT PROFILE](#) [CHANGE PASSWORD](#) [LOGOUT](#)

WHEDA only supports the use of the Internet Explorer browser while working in eWHEDA applications.

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## Viewing Your Projects

After logging in and selecting Financial Portal from the list of available applications, all projects that you have access to will be displayed. If you have access to more than one management agency, click the drop down arrow and select the appropriate management agency. The project section will be updated accordingly.





# Statements

Statements

## Financial Portal

[Statements](#) [About](#) [Instructions](#) [Logout](#)

[Financial Portal Home](#) > Statements

Management Agency:

Management Agency Name



Projects:

Select A Project



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## Viewing Project Monthly Statements

Once a project is selected, a Statements area will display with three tabs. The page will then look similar to this:

**Statements**

MonthlyActivityEscrow

Statements	Generated
<a href="#">11/30/2016 (2744) Fixed Billing Statement</a>	11/2/2016 3:09:18 PM
<a href="#">4/30/2016 (2744) Fixed Billing Statement</a>	11/2/2016 9:01:58 AM

The first tab will display a historical record of billing statements for that project. Click on the hyperlink for the billing you wish to view. If you wish to save or print the bill, place your mouse near the top of the bill and a menu will appear with options.



Use the close report button (upper right corner) to return to the project screen.

Close Report

## View Project Activity

The second tab is the activity tab. It will look similar to this:

**Statements**


Monthly Activity Escrow


☐ Report on all projects for my agency

---

Activity for Nov 2016

**OR**


START DATE:  

END DATE:   Must be a valid month end date

Process Report

## View Project Activity for Previous Month

By the 2<sup>nd</sup> of each month, the Activity for MMM YYYY will change to the previous month. To access this report, simply click on the button. This will produce a report of financial activity for the project you have selected. Here is a snippet of that report:



**WHEDA**

Loan Number: [REDACTED]  
Balances as of: 10/31/2016

Property Address:

[REDACTED]

WHEDA  
PO BOX 1728  
201 W WASHINGTON AVE 700  
MADISON, WI 53701-1728

CURRENT PRINCIPAL

CAPITAL NEEDS ASSESSMENT

REPLACEMENT RESERVE

RESIDUAL RECEIPTS

TAX ESCROW

Total Escrow

ORIGINAL BALANCE	\$ 4,860,000.00		\$ 3,992,585.36
P & I CONSTANT	\$ 26,364.97		
INTEREST RATE	5.093%		
TERM	120		
MATURITY DATE:	01/01/2017		
BORROWER DUE DATE	11/01/2016		
			\$ 73,970.83
			\$ 233,989.92
			\$ -
			\$ 5,240.70
			<u>\$ 313,201.45</u>

**WHEDA Financing Activity**

<u>Transaction Code</u>	<u>Transaction Date</u>	<u>Transaction Amount</u>	<u>Principal</u>	<u>Interest</u>	<u>Late Charge</u>	Fee Paid	<u>Escrow Received</u>	<u>Escrow Disbursed</u>
ESCROW INTEREST	10/1/16	\$ 515.54					125.30	CAPITAL NEEDS ASSESSMENT
							390.24	REPLACEMENT RESERVE
REGULAR PAYMENT	10/11/16	\$ 29,547.88	\$ 9,381.62	\$ 16,983.35			2,638.00	REPLACEMENT RESERVE
							544.91	TAX ESCROW
WHEDA Financing Activity Totals:			<u>\$ 9,381.62</u>	<u>\$ 16,983.35</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 3,698.45</u>	<u>\$ -</u>

A menu of options is available at the top of the report to save, print, email etc.



Use the close report button (upper right corner) to return to the project screen.

**Close Report**

## View Project Activity for Specified Dates

If you wish to view financial activity for dates other than previous month, enter a start and end date in the fields or choose from the calendar selection.

☒ Display Report ☐ Export To Excel ☐ Export To Word ☐ Export To Rich Text

Statements


Monthly Activity Escrow


☐ Report on all projects for my agency

---

Activity for Nov 2016

**OR**


START DATE: 06/01/2016 

END DATE: 09/30/2016  Must be a valid month end date

Process Report

Click the Process Report button.

A report for the dates specified will appear:



**WHEDA**

Loan Number: [REDACTED]

Balances as of: 09/30/2016

WHEDA  
PO BOX 1728  
201 W WASHINGTON AVE 700  
MADISON, WI 53701-1728

ORIGINAL BALANCE	\$ 4,860,000.00	CURRENT PRINCIPAL	\$ 3,992,585.36
P & I CONSTANT	\$ 26,364.97		
INTEREST RATE	5.093%		
TERM	120		
MATURITY DATE:	01/01/2017	CAPITAL NEEDS ASSESSMENT	\$ 73,845.53
BORROWER DUE DATE	11/01/2016	REPLACEMENT RESERVE	\$ 230,961.68
		RESIDUAL RECEIPTS	\$ -
		TAX ESCROW	\$ 4,695.79
		Total Escrow	\$ 309,503.00

**WHEDA Financing Activity**

Transaction Code	Transaction Date	Transaction Amount	Principal	Interest	Late Charge	Fee Paid	Escrow Received	Escrow Disbursed
ESCROW INTEREST	6/1/16	\$ 260.04					65.42	CAPITAL NEEDS ASSESSMENT
							194.62	REPLACEMENT RESERVE
REGULAR PAYMENT	6/10/16	\$ 29,532.88	\$ 9,224.04	\$ 17,140.93			2,623.00	REPLACEMENT RESERVE
							544.91	TAX ESCROW
ESCROW INTEREST	7/1/16	\$ 251.68					62.77	CAPITAL NEEDS ASSESSMENT
							188.91	REPLACEMENT RESERVE
REGULAR PAYMENT	7/11/16	\$ 29,532.88	\$ 9,263.19	\$ 17,101.78			2,623.00	REPLACEMENT RESERVE
							544.91	TAX ESCROW
ESCROW INTEREST	8/1/16	\$ 237.31					58.67	CAPITAL NEEDS ASSESSMENT
							178.64	REPLACEMENT RESERVE
REGULAR PAYMENT	8/10/16	\$ 29,532.88	\$ 9,302.50	\$ 17,062.47			2,623.00	REPLACEMENT RESERVE
							544.91	TAX ESCROW
ESCROW INTEREST	9/1/16	\$ 390.08					95.57	CAPITAL NEEDS ASSESSMENT
							294.51	REPLACEMENT RESERVE
REGULAR PAYMENT	9/12/16	\$ 29,547.88	\$ 9,341.98	\$ 17,022.99			2,638.00	REPLACEMENT RESERVE
							544.91	TAX ESCROW
WHEDA Financing Activity Totals:			\$ 37,131.71	\$ 68,328.17	\$ -	\$ -	\$ 13,825.75	\$ -

To export this report to Excel, choose the Export to Excel option. Process the report and you will be prompted to open or save an excel file.

☒ Display Report ☐ Export To Excel ☐ Export To Word ☐ Export To Rich Text


### Statements

Monthly Activity Escrow

☐ Report on all projects for my agency

Activity for Nov 2016

**OR**

START DATE: 06/01/2016 

END DATE: 09/30/2016  Must be a valid month end date

Process Report

## Report On All Projects For My Agency

If you wish to produce activity statements for every project your agency manages, click the “Report on all projects for my agency” box. You can then use the previous month option, or the date range option to produce all your activity statements.

## Viewing Escrow Transactions

The third tab is the Escrow tab:

☒ Display Report ☐ Export To Excel ☐ Export To Word ☐ Export To Rich Text

Statements

Monthly Activity **Escrow**

**This report is agency based. All projects with activity in the previous month will be included. If you desire this information monthly, you must run it each month on or after the 2nd of the month for balances for the previous month.**

**Process Report**

The previous months report will be available by the 2<sup>nd</sup> of the month. This report is agency based. All of your projects will appear on this report. Click the Process Report button.





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201 West Washington Avenue, Suite 700  
P.O. Box 1728

As of: 11/07/2016

	BALANCE AS OF 10/31/2016	INTEREST EARNED IN 10/31/2016	INTEREST EARNED YTD THRU 10/31/2016	INTEREST RATE
REPLACEMENT RESERVE	153,858.95	259.26	1,370.60	
	153,858.95	259.26	1,370.60	2.07000%
<b>Total:</b>	<b>\$ 153,858.95</b>	<b>\$ 259.26</b>	<b>\$ 1,370.60</b>	
REPLACEMENT RESERVE	156,065.66	261.39	1,468.26	
	156,065.66	261.39	1,468.26	2.07000%
<b>Total:</b>	<b>\$ 156,065.66</b>	<b>\$ 261.39</b>	<b>\$ 1,468.26</b>	
REPLACEMENT RESERVE	48,912.85	81.17	443.35	
	48,912.85	81.17	443.35	2.07000%
<b>Total:</b>	<b>\$ 48,912.85</b>	<b>\$ 81.17</b>	<b>\$ 443.35</b>	
INSURANCE ESCROW	3,723.25			
	3,723.25			
REPLACEMENT RESERVE	80,024.26	130.93	683.05	
	80,024.26	130.93	683.05	2.07000%
<b>Total:</b>	<b>\$ 83,747.51</b>	<b>\$ 130.93</b>	<b>\$ 683.05</b>	
DEVELOPMENT COST	5,311.89	9.00	52.25	
	5,311.89	9.00	52.25	2.07000%
REPLACEMENT RESERVE	198,872.66	344.59	1,952.74	
	198,872.66	344.59	1,952.74	2.07000%
RESIDUAL RECEIPTS	29,514.38	50.00	292.96	
	29,514.38	50.00	292.96	2.07000%
TAX ESCROW	16,710.90			
	16,710.90			
<b>Total:</b>	<b>\$ 250,409.83</b>	<b>\$ 403.59</b>	<b>\$ 2,297.95</b>	

A menu of options is available at the top of the report to save, print, email etc.



Use the close report button (upper right corner) to return to the project screen.

[Close Report](#)

To export this report to Excel, choose the Export to Excel option. Process the report and you will be prompted to open or save an excel file.

☐ Display Report ☒ Export To Excel ☐ Export To Word ☐ Export To Rich Text

Statements

Monthly Activity Escrow

**This report is agency based. All projects with activity in the previous month will be included. If you desire this information monthly, you must run it each month on or after the 2nd of the month for balances for the previous month.**

[Process Report](#)

## About Menu

From this menu, please find information on when statements are available.



The screenshot shows the 'About' page of the WHEDA Financial Portal. At the top left is the WHEDA logo, which consists of a stylized green and blue cube icon above the text 'WHEDA'. To the right of the logo is the word 'About' in a large green font, with the subtitle 'About the Financial Portal' in a smaller green font below it. Below the logo and subtitle is the text 'Financial Portal' in a large green font. Underneath this is a horizontal navigation bar with four buttons: 'Statements', 'Administration', 'About' (which is highlighted with a green border), and 'Logout'. Below the navigation bar is a breadcrumb trail: 'Financial Portal Home > About'. The main heading of the page is 'Statements Availability' in a large green font. Below this heading, there are two sections. The first section is '1st business day of the month' in a large green font, followed by a bulleted list with two items: 'Fixed Interest Loans' and 'Variable Rate Loans'. The second section is '2nd business day of the month' in a large green font, followed by a bulleted list with three items: 'Section 8 Contracts', 'Escrow', and 'Activity'. At the bottom of the page is a footer containing the copyright notice '© 2016 WISCONSIN HOUSING AND ECONOMIC DEVELOPMENT AUTHORITY' and three links: 'terms of use', 'legal notice', and 'privacy policy' (partially visible as 'pri').

**WHEDA**

# About

About the Financial Portal

## Financial Portal

Statements Administration **About** Logout

[Financial Portal Home](#) > About

### Statements Availability

#### 1st business day of the month

- Fixed Interest Loans
- Variable Rate Loans

#### 2nd business day of the month

- Section 8 Contracts
- Escrow
- Activity

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## Managing Users

After logging in, click on the Administration Tool menu.



### Available Applications

APPLICATION NAME	DESCRIPTION
► <a href="#">Administration Tool</a>	A user administration module accessible to Delegate Administrators

## Creating a New User

To create a new user for your organization, click the Create User button.



## User Management for eWHEDA Services

### User Management Main Menu:

List  
Applications

List  
Companies

Create  
User

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Fill in the First Name, Last Name and email fields. The Permissions area will list those eWHEDA applications that you are the Delegated Administrator for. It will look similar to this. Check the Applications you want the user to have access to. Click the Submit Button.



## Delegate Administrator User Setup for eWHEDA Services

Please complete and submit the information on this form to start the self registration process for a given user.

*\*Indicates Required Fields*

**First Name:** \*

**Last Name:** \*

**Email:** \*

### Permissions:

<i>Company</i>	<i>Application</i>
Project Name	<input type="checkbox"/> MFFP
Project Name	<input type="checkbox"/> FORM500
Project Name	<input type="checkbox"/> MQOR
Project Name	<input type="checkbox"/> RCRS

Submit

Clear

Cancel

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The user will receive an automated “Sign-up” email message within the hour. If they do not received it, please have them check their junk mail. If it’s still not received, please contact WHEDA support staff at 1-800-334-6873.

### **Applying Additional Permissions to Existing Users**

From the Admin Tool menu, choose List Companies. Choose your company. All existing users will be displayed. Check the box next to the application and user name to give them access.

### **Removing an Users Access**

There are two ways to remove user access. You can click on the List Applications button and then click on the specific application and uncheck the users access. OR you can click on the List Companies button, select the company and uncheck applicable boxes for the user. When finished, click submit.

**\*\*Note** there is a functionality issue with returning to your applications page after managing users. You will need to close out of the browser and log back in.