Trust Fund Department

MITAS Reservation Manual and Document Uploading Guide
Single Family Rehabilitation with Roof only (SFR-R)

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INTRODUCTION:

The SFR Reservation Manual and Document Uploading Guide is designed to make the reader familiar with reserving funds and uploading documents to the MITAS system through the ILRS website (https://ilrss.ihda.org/ilrss/). After reading this manual, you, the reader, should have an understanding of the process of locking funds and uploading the necessary documents for the Program. Throughout the manual you will find “Important Notes”. Please pay attention to these as they are designed to make the uploading process easier.

Should you have questions or need clarification on anything contained in this guide, please feel free to contact Community Affairs at TFSFRinfo@ihda.org.

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Go to https://ilrss.ihda.org/ilrss/ to reach the MITAS login screen.

**Note:** For optimal performance, use the Internet Explorer browser instead of other browsers like Google Chrome or Firefox.

This is the first screen you will see on the IHDA reservation website. You will need to know your IHDA lender number (STF # minus the second digit), your user name and your initial password. This information can be obtained from your MITAS Systems Administrator at your agency. If you do not know who your administrator is, contact a Community Affairs Program Officer to direct you further.

If you are familiar with MITAS and have used it to reserve funds previously, you may skip the next few pages and go to page 8 to start a new loan. Otherwise, turn to the next page.
If this is your first time using the MITAS system, you may be prompted to change your password. The minimum password length is eight (8) characters including one (1) upper case letter, one (1) lower case letter and one (1) numeric digit. Be sure you choose a password that is easy to remember.

After you have changed your password, click “Submit” to complete the change. (Be sure to write your password down and keep it in a safe place for future transactions.) After clicking “Submit,” on the left-hand side of the screen, you will be taken to the Main Menu screen. If this is your first time using MITAS, please click on “Address Maintenance” to update or complete contact information.
MAIN MENU:

Above is the Main Menu screen that you will see upon logging in to the Reservation Website.

Note: Only System Administrators will see the top link **WEB User Maintenance** which allows them to set up new users and update information on current users including password maintenance and unlocking users who have been locked out.
ADDRESS MAINTENANCE:

If this is your first time using the MITAS system, you will need to access this screen. Please input your contact information including your name, company, address, phone numbers, fax number and e-mail address. You will use this screen to change your password and contact information. Once you have completed this page click “Submit”.

**IMPORTANT NOTE:** Use the Back button on the MITAS system. DO NOT use the back button on your internet browser. Using the back button on your internet browser will take you out of the MITAS system and you will have to re-enter the MITAS system and start over.
You have now returned to the main menu. See below for a description of the options:

1. WEB User Maintenance – Allows system administrators to maintain all user accounts
2. New Loan Registration – Allows for the reservation/locking of funds
3. View Loan Pipeline – Allows the user to view/retrieve any loan via program type
4. View Loan Detail – Allows the user to view/retrieve any loan via the IHDA Loan Number (MITAS Commitment Number)
5. Address Maintenance – Allows the user to update their personal information (i.e. phone number, e-mail address, etc.)
6. Reports – Allows canned reports to be ran

Click “New Loan Registration” to reserve a loan.
NEW LOAN REGISTRATION:

This screen lists all of the IHDA programs available to your agency under Trust Fund. Please look for the SFR program, and find the allocation pot (by AMI) for which you wish to allocate funds. If you are not ready to make a reservation, but would like to know how much money is remaining in a particular program, you will find that information here. If you do not want to reserve a loan at this time, click “logoff” on the left-hand side of the screen.

Please note that the reservation process is the same for any type of loan program.
After selecting one of the available program options, you will be directed to the Loan Info screen. Complete the reservation by continuing through the screens.

**Note:** Mandatory fields are highlighted. You as the Sponsor may fill out any information on any screen, but IHDA requires the above fields to be completed.

After completing this information, click “next” on the left-hand side of the screen to access the property information screen or click directly on the “Property” link.
PROPERTY INFORMATION:

Please enter the address of the subject property as well as the highlighted construction information.

**Note:** Mandatory fields are highlighted. You as the Sponsor may fill out any information on any screen, but IHDA requires the above fields to be completed. Please note that the “year built” is now required to help us collect data for lead reduction initiatives.

Once the information is completed click “next,” which is located on the left-hand side of the screen to be taken to the Mortgagor screen.
PRIMARY MORTGAGOR INFORMATION:

Complete all necessary data fields on this screen.

**Note:** Mandatory fields are highlighted. You as the Sponsor may fill out any information on any screen, but IHDA requires the above fields to be completed.

If there is a co-mortgagor click “Next” and complete all data fields on the following screen. If there is no co-mortgagor, click “1003 Details of Trans” on the left-hand side of the screen to continue the reservation process.
CO-MORTGAGOR INFORMATION:

If applicable, fill out the information for any Co-Mortgagor(s). If you are simply updating information, you can submit here to continue to the Reservation Confirmation.

Note: See screen shot for mandatory fields. You as the Sponsor can fill out any information on any screen, but IHDA requires the above fields to be completed.
DETAILS OF TRANSACTION:

You will not enter any information here; you should, however, check line o “Cash from/to Borrower”. This is the total trust fund assistance, so be sure that it matches your requested amount for this applicant.

**Important Note:** The “Cash from Borrower” amount should be equal to the Assistance being granted from IHDA.

If you have completed reserving your loan, click the “Submit” button on the left-hand side of the screen.
COMMITMENT CONFIRMATION:

The above screen will appear if you have correctly made a reservation under the Single Family Rehabilitation Program. To print the information on this screen, click on “Printer Friendly” and proceed to print. As a reminder, you will need to submit this form along with any uploads when seeking Pre-approval.

If you wish to review your loan, click “Submit” rather than “Logoff” and you will be taken to the “Loan Detail” page.

If there were any errors in your input, you will see a page that describes those errors. Use the back button in MITAS (not your browser’s back button) to correct the errors on the applicable screens.

Once the errors have been corrected, click “Submit” to obtain a reservation confirmation. Remember, you will e-mail TFSRinfo@ihda.org when you are ready for a Pre-Approval to begin work on your project.
RETREIVING A LOAN:

It is necessary to retrieve a loan when the following occurs:

- You need to verify or change data in the ILRS;
- You are unable to complete a reservation and need to complete it at a later time;
- You need to print the loan reservation confirmation, or
- You need to cancel a loan.

You can retrieve a loan by clicking “View Loan Detail” or “View Loan Pipeline” found on the Main Menu page shown above.
VIEW LOAN DETAIL:

On the Loan Detail page, enter the IHDA loan number at “Retrieve a Loan,” then click on “Retrieve.” Note that you also have the ability to cross reference, which allows you to retrieve a loan by borrower name.

If you do not know the IHDA loan number, you can retrieve it through the “View Loan Pipeline” function which will be discussed on the next page.
VIEW LOAN PIPELINE:

On the main menu, click “View Loan Pipeline.”

Once you click “View Loan Pipeline,” you will see a list of IHDA programs that are available to your agency. Click the program under which the loan you are trying to retrieve is reserved. For example, if the loan you are trying to retrieve is reserved under Single Family Rehabilitation – 50% AMI, click on that category to see the pipeline. Program allocations by AMI were established as estimates, but accuracy is important for reporting and data collection. If you are running near the maximum allocation for a specific category, please contact your IHDA program officer to see if funds are available from your grant.
Once you choose the program, you will find a list of loans listed by status, such as incomplete reservation, reservation, etc. For example, if you are trying to complete a reservation, click “Incomplete Reservation” to find buyers’ names listed under that status. If you are trying to view loans that have been canceled, click “Canceled” to find buyers’ names listed under that status.

Once you find the name of the buyer whose loan reservation you are trying to retrieve, click it to be directed to the “Loan Detail” page.
You will upload documents to MITAS through the Reservation website. On the Loan Detail screen of the reservation, there is a table with links on top which allows you to perform various functions.
The Loan Detail screen can be found from the Main Menu using either the “View Loan Detail” link or the “View Loan Pipeline” link. To upload documents, click on the Document Images button.

**Important Note:** Please upload all Pre-Approval packages through the ILRS website

Once there, proceed to browse for the document you wish to upload.

*Note: All uploaded files must be in .PDF format.* Once you have selected the file you wish to upload, click on the “Upload” button to upload the file to MITAS. A few things to consider:

1. All categories found in Document Imaging are subject to change. The process will remain unchanged, but the number of options may change.
2. The Checklist and each document on the checklist should be uploaded separately.
   a. The Limit size per Uploaded .PDF is 103 MB with a 10-minute time-out limit
   b. If you have any issues please contact your Community Affairs Program Officer
3. The “Received” button in the above picture allows you to view the last item uploaded to that category.

**Important note:** Once uploaded, you must make sure to finalize the upload process by clicking on the “Process Now” button.

Your documents are now uploaded to the MITAS system and can be viewed by a Program Officer. Even though the documents are immediately uploaded, the Program Officers are not made aware of the uploaded documents until the following day (via report). Therefore, you must email TFSFRinfo@ihda.org to let us know you have uploaded documents for pre-approval.
Using the ILRS to View Loan Level Details

You, the Sponsor can view many loan level details from the ILRS website used by IHDA. From the Main Menu, you can get to the Loan Detail Screen two ways. First, you can retrieve the specific loan number using the “View Loan Detail” link. Second, you can search by Program using the “View Loan Pipeline” link.

Once you are on the Loan Detail Screen (shown above), you can view information such as, but not limited to:

1. Loan Amount
2. Program
3. Loan Status
4. Tracking Status
5. Conditions

Once the loan is in “Completed—Trust Fund” tracking status, you, the user, are only able to retrieve other loans, print past documents, such as the Reservation Confirmation, or upload documents.