

# CNA e-Tool v 3.0

## FAQs on the Go-Live

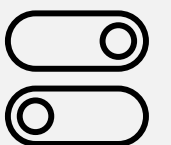
Office of Multifamily Housing Programs

November 3, 2020



What do I need to know?

On 11/7/20, Saturday (midnight EST) the entire legacy CNA e-Tool system (Public Validation, Lender Submission & HUD Reviewer Portals) will go offline for a 2-day period. During this “blackout” period all legacy CNA data will be converted into the new CNA e-Tool v3.0. On 11/9/20, Monday (8 AM EST), the new v3.0 will go-live. All users (Lenders, Needs Assessors, PHAs and PAEs) will now login to the new Web-App to initiate, prepare and submit CNAs.



I am a **Lender**.

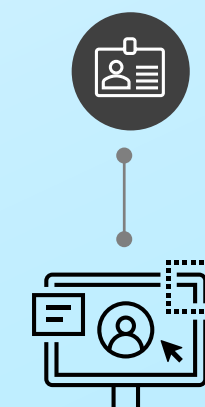
Where do I find the new CNA e-Tool?

How do I log in?

You can access the new e-Tool v3.0 by going to HUD's CNA e-Tool

[Home Page](#) and clicking on the link provided.

The login process is the same as accessing the legacy Lender Submission Portal – use the same M-ID and the same password on FHA Connect sign-on page. Select “CNA e-Tool 3.0” after signing on.



What will I see?

After you login, you will see your personalized Dashboard. The Dashboard will display CNAs that are relevant to you in 3 categorical sections (My Desk, My Partner's Desk, With Agency). You should be able to easily find CNAs that you have been working on recently.



First, you should act on all the draft CNAs that were created from the Assessment Tool Excel files that you validated for your Needs Assessors during the Data Transfer period.

- You should see them in “My Desk” section of your Dashboard.
- If you don't see them there, you can search for them by clicking on the “Search” tab on the left side bar.
- You can search by Property Names or Assessment IDs if you jotted them down after validating in the legacy portal. You can also search by the Date of validation.
- After you find the CNAs, promptly ‘Send’ them to your partner Needs Assessors.

Assessment ID	Property Name
2020-100334	Pete Test New Factors
2020-100330	Test Property

My CNAs (53) Search

SEARCH YOUR FIRM/AGENCY CNAS

Select Search Type...

- Legacy Assessment ID
- Partner Name
- Property Name
- Property ID Number
- BAD BIC Number
- Property ID Number

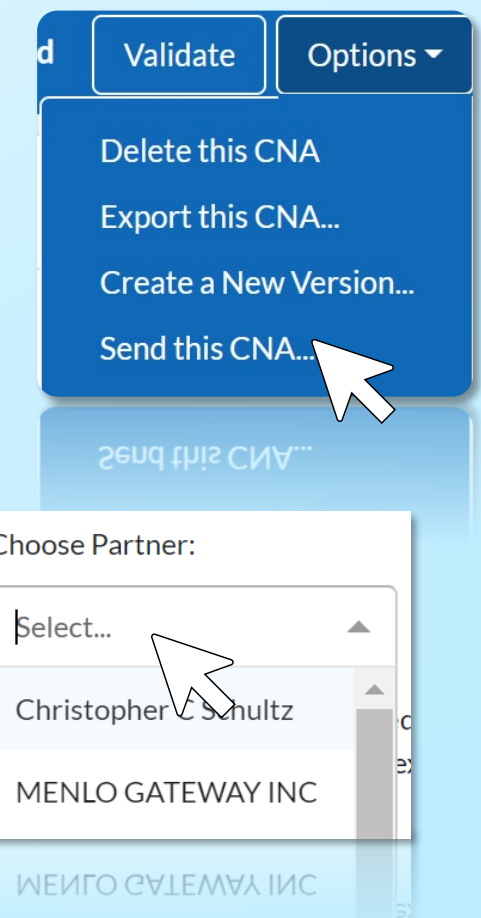
What should I do next?

I am a Lender.

How do I 'Send'?

You can 'Send' those CNAs to your partner Needs Assessors by clicking on "Options" (top right) and selecting "Send this CNA" option. Please make sure that you select the right Needs Assessor in the "Choose Partner" picklist for each CNA.

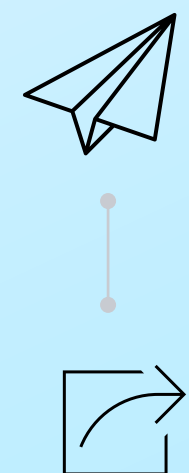
You need to 'Send' to the Needs Assessor that emailed you the Excel file – the one who is hired to complete that CNA. In most cases we pre-selected the Needs Assessor for you so you should only see one option. Email [CNAeTool@HUD.gov](mailto:CNAeTool@HUD.gov) if the selection is incorrect.



What about all other CNAs that I was working on?

All the CNAs that you were in the process of entering Flags notes and attaching files and did 'Saved as Draft' within past 3 months should appear in your Dashboard, "My Desk." If your Needs Assessor still needs to complete entering data, you can 'Send' them.

When you are all done, 'Submit' to HUD as usual.



I am a Lender.

What about all the previously submitted CNAs?



The CNAs that you submitted using the legacy e-Tool in recent months should now appear in your Dashboard, “With Agency” section. You can readily see their status.

- CNAs currently under review by HUD will be marked with a circle.
- CNAs that are reviewed and awaiting decision will have no mark.
- CNAs that are approved will have a green checkmark.
- CNAs that are ‘Returned’ to you will appear in your “My Desk” section, marked with a red triangle. You can “Create New Version” of that CNA and begin to edit to correct any deficiency.

▼ WITH AGENCY (4)		
Assessment ID	Property Name	
2020-100332	HUD Office Hou Property	
○ 2020-100273	BuildingA	
○ 2020-100045	Test Severe Flag	
✓ 2020-100042	TEAM 1 - CNA A	
▲ 2020-100056	TEAM 1 - CNA B	

▼ MY DESK (1)		
Assessment ID	Property Name	
▲ 2020-100056	TEAM 1 - CNA B	

What about older CNAs?

You can locate all the CNAs that belong to your organization (i.e. the CNAs that your organization submitted and received Approval or were Returned) in the Search Tab. We converted all legacy CNAs in our database as new v3.0 CNAs and associated them to the original submitter Lender firms. They can be searched and viewed only by the original Lender and the Needs Assessor that prepared them.

My CNAs (53) Search

SEARCH YOUR FIRM/AGENCY CNAS

Select Search Type...

Legacy Assessment ID

Partner Name

Property Name

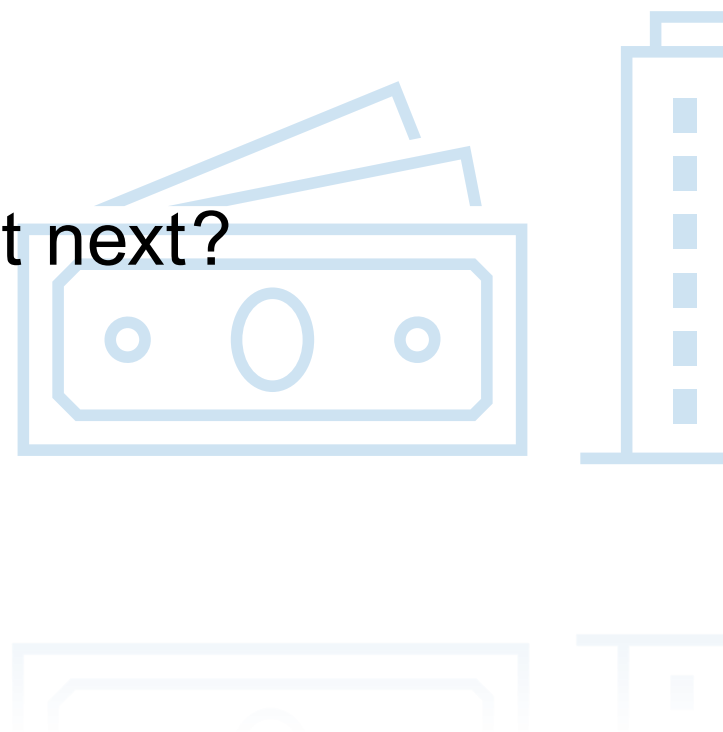
Property ID Number

BAD BIC Number

Property ID Number

I am a Lender.

What next?



Going forward, your [role](#) in the CNA process is the 'Submitter.' That means that for any new CNA that you want to prepare and submit to HUD as part of a new loan application, you must:

- First 'Initiate' that CNA by starting a new CNA in the e-Tool v3.0 and fill out the CNA Summary;
- Enter other relevant information such as participants and even upload supporting documents or exhibits for your Needs Assessor as attachments;
- Select your partner Needs Assessor and 'Send' the CNA; and,
- Submit the CNA to HUD when everything is complete.

Remember, that any new CNA must be initiated by you first in the e-Tool and sent to your Needs Assessor before they can work on the assignment.





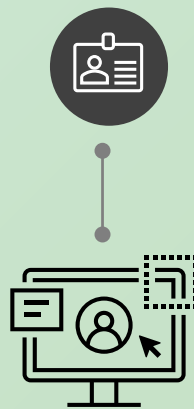
I am a **Needs Assessor**.

Where do I find the new CNA e-Tool?

How do I log in?

You can access the new e-Tool v3.0 by going to HUD's CNA e-Tool [Home Page](#) and clicking on the link provided.

All users now log in to a secured website to use CNA e-Tool. The legacy Public Validation portal is no more. As a Needs Assessor, use your Multifamily Participant User login ID (M-ID) and the password that you established with WASS (see [User Access Guide](#)) to log in.



What will I see?

After you log in, you will see your personalized Dashboard. The Dashboard has 4 categorical sections: New Assignments Received; My Desk; My Partner's Desk; & With Agency.

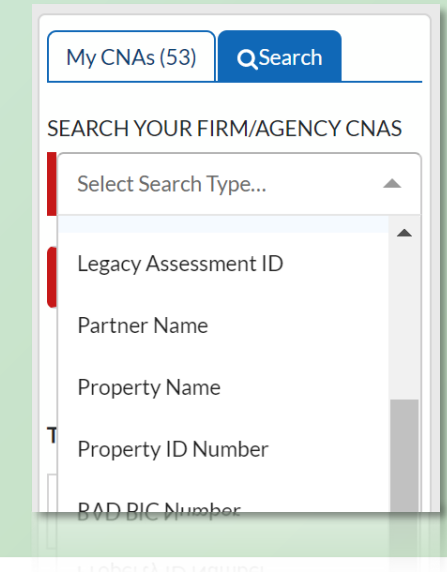
- When you first log in, you may only see CNAs in “New Assignments Received” section. These are the new CNAs that your Submitter (e.g. Lender) initiated and sent to your firm to complete using the new e-Tool v3.0.
- You will likely not see any CNAs in “My Desk” or “My Partner's Desk” sections at first. But as you start to open CNAs and edit/save and send back and forth with your Submitter, these sections will populate.

▶ NEW ASSIGNMENTS RECEIVED (1)
▶ MY DESK (34)
▶ MY PARTNER'S DESK (12)
▶ WITH AGENCY (3)
▶ WITH AGENCY (3)

I am a Needs Assessor.

How do I find CNAs I need to work on?

Go to the **“Search” Tab** to find all the CNAs that belong to your firm. You can also find draft CNAs created from the Assessment Tools that your Submitter (i.e. Lender & PHAs/PAEs) validated to do “Data Transfer” on your behalf. You can search by the CNA’s Property Name, Assessment ID, or other search parameters available.



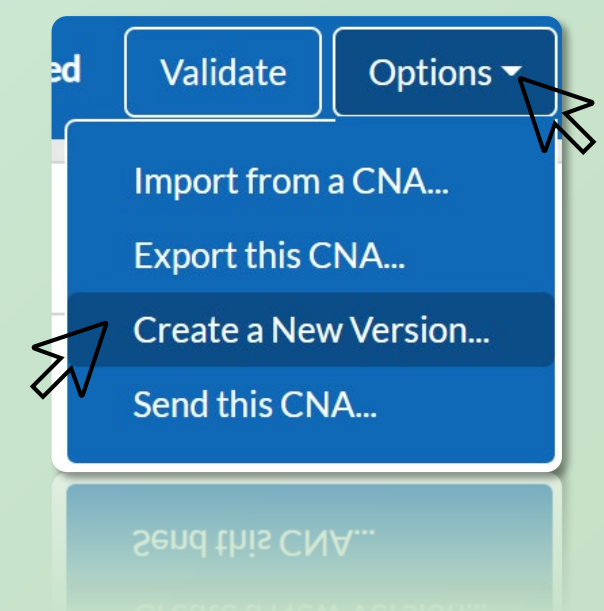
Once you located your draft CNA in the Search Screen, open the CNA to check the Status at the top. If the Status is “Draft-Unclaimed” you can start entering data. As soon as you click ‘Save’ on any of the screens, you have claimed that CNA and it will appear in “My Desk” section of your dashboard going forward.

Status: Draft – Unclaimed

If the Status is “Draft-On Partner’s Desk”, your Lender has possession, and you cannot edit or enter data. You can do 2 things to be able to work on it:

Status: Draft – On Partner’s Desk

1. Contact your Submitter and ask to ‘Send’ that CNA to you within e-Tool v3.0. It will appear in “New Assignments Received” section once sent. Open and proceed.
2. You can “Create a New Version” of that CNA. That will duplicate of the original CNA as a new Assessment ID. It will now be in your possession to edit and will appear in your “My Desk.” Make sure to tell your Submitter that you created a new version of that CNA that you are working on.



How do I continue working on these draft CNAs?



I am a Needs Assessor.

What next?



Going forward, your [role](#) in the CNA process is the 'Preparer.' That means that you will be partnering with Lenders, PHAs & PAEs for completing CNAs for submission in most cases.

- Your partner 'Submitter' will first 'Initiate' a CNA by starting a new CNA in the e-Tool v3.0 and filling out the CNA Summary;
- That CNA will then be 'Sent' to your firm within the e-Tool;
- Open the CNA assigned to you and claim it by entering and saving any data. It will now appear in "My Desk";
- Send the CNA to your partner Submitter once complete for Submission to HUD.

There are CNA program types where you will be both the 'Preparer' and 'Submitter' (see [User Path Matrix](#)).

- For such CNAs, you will initiate it by starting a new CNA in the e-Tool and complete all the data.
- When finished, you will also 'Submit' to HUD for review and approval.





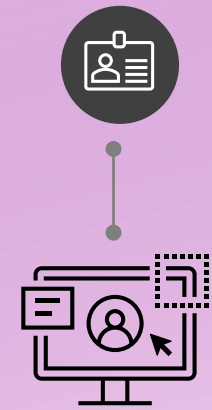
I am a **PHA/PAE**.

Where do I find the new CNA e-Tool?

How do I log in?

You can access the new e-Tool v3.0 by going to HUD's CNA e-Tool [Home Page](#) and clicking on the link provided.

All users now log in to a secured website to use CNA e-Tool. Use your Multifamily Participants User login ID (M-ID) and the password that you established (see [User Access Guide](#)) to log in.



What will I see?

After you log in, you will see your personalized Dashboard. The Dashboard will display CNAs that are relevant to you in 3 categorical sections (My Desk, My Partner's Desk, With Agency). You should be able to easily find CNAs that you will be working on.

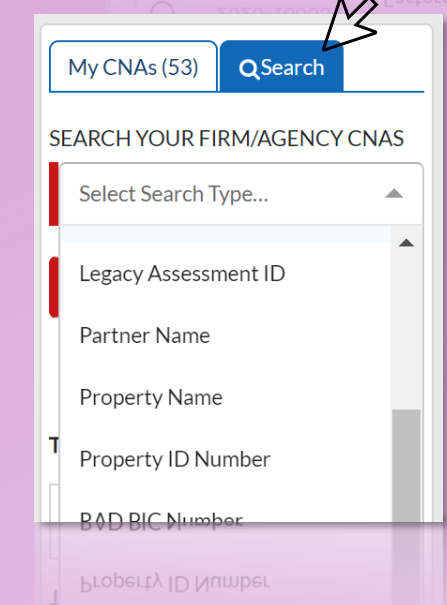


What should I do next?

First, you should act on all the draft CNAs that were created from the Assessment Tool Excel files that you validated for your Needs Assessors during the Data Transfer period.

- You should see them in "My Desk" section of your Dashboard.
- If you don't see them there, you can search for them by clicking on the "Search" tab on the left side bar.
- You can search by Property Names or Assessment IDs if you jotted them down after validating in the legacy portal. You can also search by the Date of validation.
- After you find the CNAs, promptly 'Send' them to your partner Needs Assessors.

Assessment ID	Property Name
2020-100334	Pete Test New Factors
2020-100330	Test Property

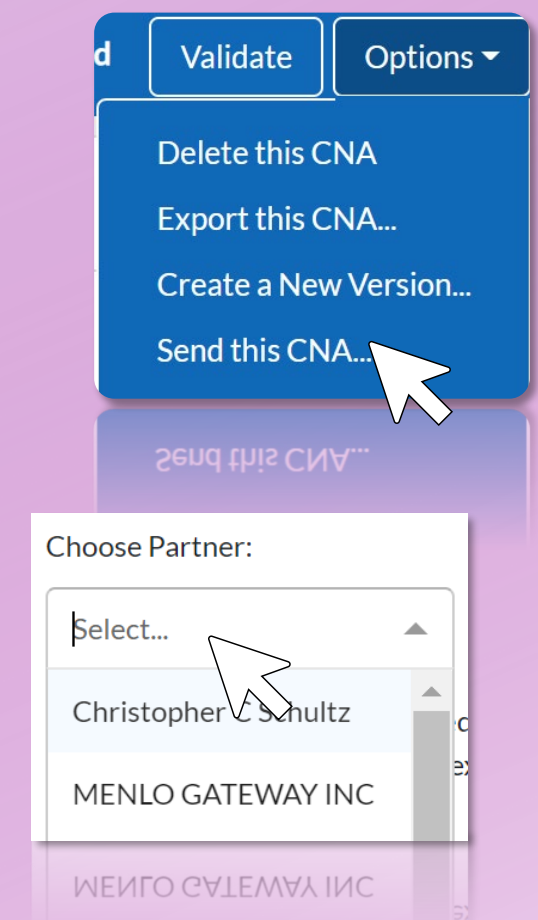


I am a PHA/PAE.

How do I 'Send'?

You can 'Send' those CNAs to your partner Needs Assessors by clicking on "Options" (top right) and selecting "Send this CNA" option. Please make sure that you select the right Needs Assessor in the "Choose Partner" picklist for each CNA.

You need to 'Send' to the Needs Assessor that emailed you the Excel file – the one who is hired to complete that CNA. In most cases we pre-selected the Needs Assessor for you so you should only see one option. Email [CNAeTool@HUD.gov](mailto:CNAeTool@HUD.gov) if the selection is incorrect.



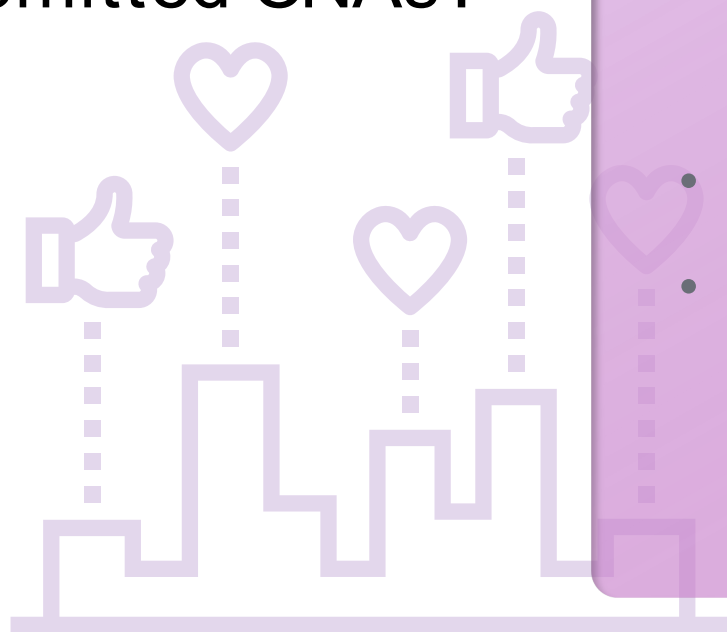
What about the CNAs that I will be completing for submission?

According to the [User Path Matrix](#), PHAs may be the one to prepare all the data in a CNA for "RAD-PH New Construction" and "PH Sub Rehab" as an option. For such CNA programs, you may choose not to involve a separate Needs Assessor. All the data entry screens are editable for you. Once completed, proceed to submit to HUD.



I am a PHA/PAE.

What about all the previously submitted CNAs?



The CNAs that you submitted using the legacy Assessment Tool in recent months should now appear in your Dashboard, “With Agency” section. If you do not see them there, you can go to the Search Tab and find by searching.

- CNAs currently under review by HUD will be marked with a circle.
- CNAs that are reviewed and awaiting decision will have no mark.
- CNAs that are approved will have a green checkmark.
- CNAs that are ‘Returned’ to you are marked with a red triangle. You can “Create New Version” of that CNA and begin to edit to correct any deficiency.

▼ WITH AGENCY (4)	
Assessment ID	Property Name
2020-100332	HUD Office Hou Property
○ 2020-100273	BuildingA
○ 2020-100045	Test Severe Flag
✓ 2020-100042	TEAM 1 - CNA A
▲ 2020-100056	TEAM 1 - CNA B

▼ MY DESK (1)	
Assessment ID	Property Name
▲ 2020-100056	TEAM 1 - CNA B

What about older CNAs?

You can locate all the CNAs that belong to your organization (i.e. the CNAs that your organization submitted and received Approval or were Returned) in the Search Tab. We converted all legacy CNAs in our database as new v3.0 CNAs and associated them to the original submitter organizations. They can be searched and viewed only by the original submitters.

My CNAs (53) Search

SEARCH YOUR FIRM/AGENCY CNAS

Select Search Type...

Legacy Assessment ID

Partner Name

Property Name

Property ID Number

BAD BIC Number



I am a PHA/PAE.

What next?

Going forward, your [role](#) in the CNA process is primarily the 'Submitter.'

That means that for any new CNA that you want to prepare and submit to HUD, you must:

- First 'Initiate' that CNA by starting a new CNA in the e-Tool v3.0 and fill out the CNA Summary;
- Enter other relevant information such as participants and even upload supporting documents or exhibits for your Needs Assessor as attachments;
- Select your partner Needs Assessor and 'Send' the CNA; and,
- Submit the CNA to HUD when everything is complete.

For ["RAD-PH Rehab"](#) and ["PH Sub Rehab"](#) CNA program types, you have the option of being the 'Preparer' as well.

- For such CNAs, you will initiate it by starting a new CNA in the e-Tool and complete all the data.
- When finished, you will also 'Submit' to HUD for review and approval.

