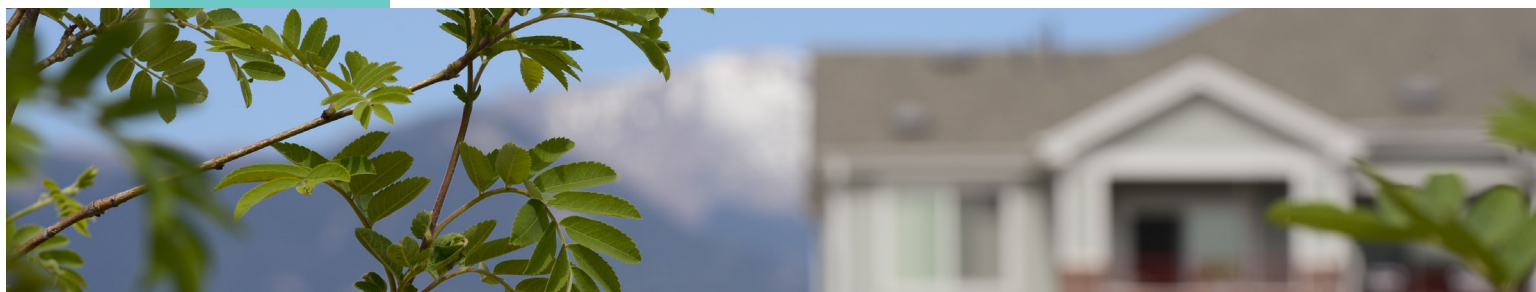




insight quick step user guide



business finance loans

March 2021



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 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.

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

www.chfainfo.com

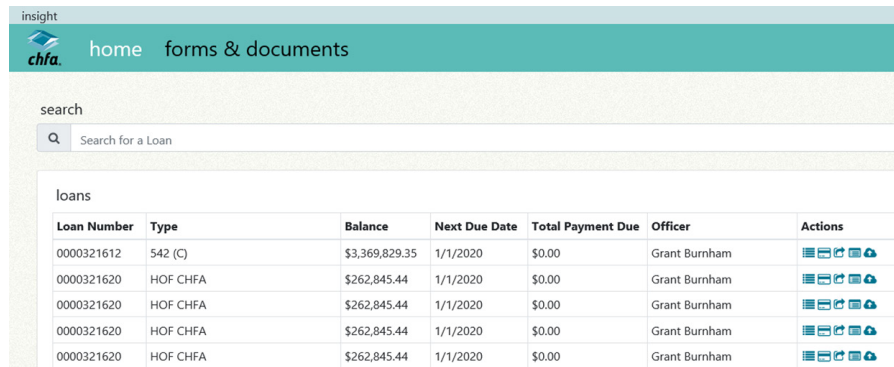
 

[terms and conditions](#) [privacy and security policy](#)

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 show your CHFA loans. You may filter your display list by the info listed in the columns. To view more information for a loan, hover over the action icons to see the name of the page you will be navigated to, then click.



The screenshot shows the CHFA Insight home page. At the top, there is a navigation bar with 'home' and 'forms & documents' links. Below this is a search bar with the placeholder text 'Search for a Loan'. The main content area displays a table of loans with the following columns: Loan Number, Type, Balance, Next Due Date, Total Payment Due, Officer, and Actions. The table contains five rows of loan data.

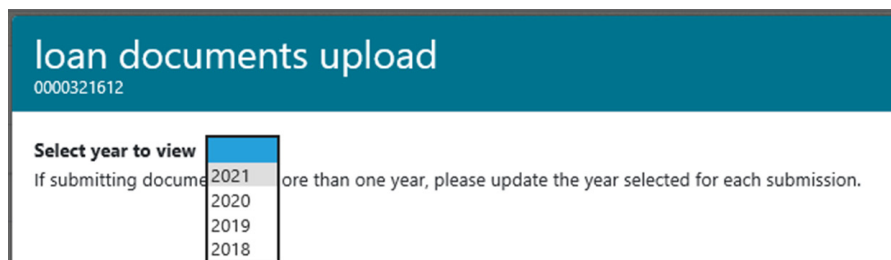
Loan Number	Type	Balance	Next Due Date	Total Payment Due	Officer	Actions
0000321612	542 (C)	\$3,369,829.35	1/1/2020	\$0.00	Grant Burnham	[Icons]
0000321620	HOF CHFA	\$262,845.44	1/1/2020	\$0.00	Grant Burnham	[Icons]
0000321620	HOF CHFA	\$262,845.44	1/1/2020	\$0.00	Grant Burnham	[Icons]
0000321620	HOF CHFA	\$262,845.44	1/1/2020	\$0.00	Grant Burnham	[Icons]
0000321620	HOF CHFA	\$262,845.44	1/1/2020	\$0.00	Grant Burnham	[Icons]

The following buttons are an action to the loan:

-  Details
-  Make a Payment
-  Fees, Transactions, and Disbursements
-  eStatements
-  Upload Loan Documents

3. uploading loan documents

- To begin, click on the Upload Loan Documents action icon next to the related loan. The system will automatically ask you to select the year for the document submission:



The screenshot shows a form titled 'loan documents upload' for loan number 0000321612. It features a dropdown menu labeled 'Select year to view' with a list of years: 2021, 2020, 2019, and 2018. Below the dropdown, there is a note: 'If submitting documents more than one year, please update the year selected for each submission.'

- b. Once you have selected the year for the document submission, you will be prompted to select the document(s) to upload. To upload a document, click on the “select file” button below any of the available documents.

Note: You can upload more than one document at a time.

✕

loan documents upload

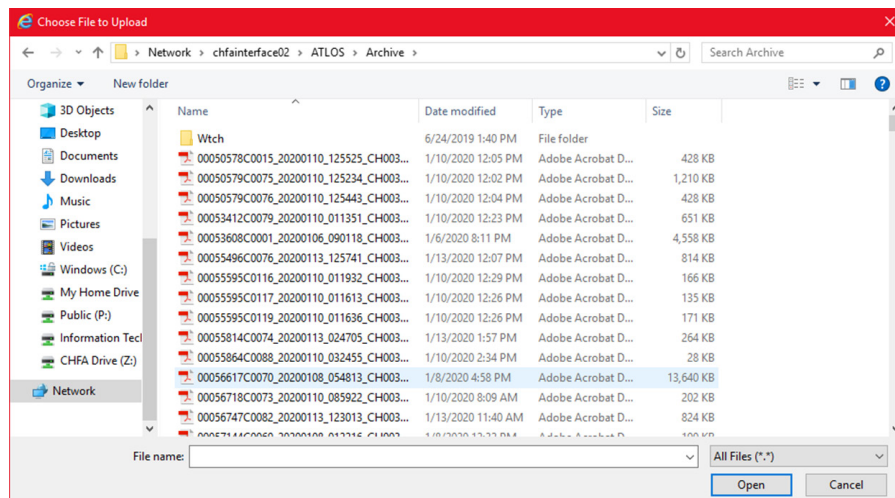
0000321612

Select year to view 2021 ▼

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

Document	Due Date
BF-Business Financial Statement(s) BF-Business Financial Statement(s) <i>Please select the correct calendar year above for the response you are submitting</i>	June 30
select file	
BF-Business Financial Tax Return(s) BF-Business Financial Tax Return(s) <i>Please select the correct calendar year above for the response you are submitting</i>	June 30
select file	
BF-Loan File	
Document	Due Date
BF-Personal Financial Statement(s) BF-Personal Financial Statement(s) <i>Please select the correct calendar year above for the response you are submitting</i>	June 30
select file	
BF-Personal Financial Tax Return(s) BF-Personal Financial Tax Return(s) <i>Please select the correct calendar year above for the response you are submitting</i>	June 30
select file	

Upload File(s)
Close



- c. Once you click on select file, File Explorer will prompt you to select a document.
- d. Once the document is selected, Insight will attach the document to the line item selected. Click the "Upload File(s)" button to complete the upload.

Note: If you select the wrong document, simply click the "remove" button.

loan documents upload
×

0000321612

Select year to view 2021

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

BF-Business Financial Statement(s)	
Document	Due Date
BF-Business Financial Statement(s) <i>Please select the correct calendar year above for the response you are submitting</i>	June 30
<div style="display: flex; align-items: center; gap: 5px;"> select file remove 00056718C0073_20200110_085922_CH0031143067_SYSID0832.pdf </div> <div style="font-size: 0.7em; margin-top: 2px;">upload pending</div>	
BF-Business Financial Tax Return(s) <i>Please select the correct calendar year above for the response you are submitting</i>	June 30
<div style="display: flex; align-items: center; gap: 5px;"> select file </div>	

BF-Loan File	
Document	Due Date
BF-Personal Financial Statement(s) <i>Please select the correct calendar year above for the response you are submitting</i>	June 30
<div style="display: flex; align-items: center; gap: 5px;"> select file </div>	
BF-Personal Financial Tax Return(s) <i>Please select the correct calendar year above for the response you are submitting</i>	June 30
<div style="display: flex; align-items: center; gap: 5px;"> select file </div>	

Upload File(s)
Close

- e. The following loading screen will pop up when the system is importing the document(s).



- f. If the document delivery is successful, the document(s) uploaded will turn green.

Note: If the document turns red, either the file type is not allowed, or the document size is too large for Insight to accept.

×

loan documents upload

0009321612

File(s) have been successfully uploaded.

Select year to view 2021 ▾

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

BF-Business Financial Statement(s)	
Document	Due Date
BF-Business Financial Statement(s) <i>Please select the correct calendar year above for the response you are submitting</i> select file 00056718C0073_20200110_085922_CH0031143067_SYSID0832.pdf upload on 1/14/2020 4:34:37 PM	June 30
BF-Business Financial Tax Return(s) <i>Please select the correct calendar year above for the response you are submitting</i> select file	June 30



BF-Loan File	
Document	Due Date
BF-Personal Financial Statement(s) <i>Please select the correct calendar year above for the response you are submitting</i> select file	June 30
BF-Personal Financial Tax Return(s) <i>Please select the correct calendar year above for the response you are submitting</i> select file	June 30

Upload File(s)
Close

4. making a loan payment

- 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 the URL <https://dev-echfa.develop.colohfa.org/Insight/home>. The browser tabs include 'chfa home page' and 'chfainfo.com'. The page content is partially obscured by a modal window titled 'submit loan payment' (ID: 0000323006). The modal displays a 'payment complete' message: 'Thank you for posting your payment!' and 'Please note the following:' followed by a bulleted list of instructions and a note about recurring payments. The background page shows a navigation menu with 'home forms & documents' 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

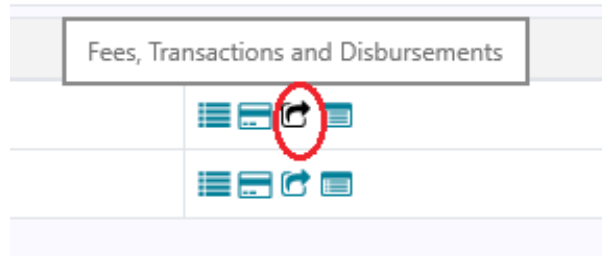
If you would like to set up an automated recurring monthly (ACH) payment, please email cssupport@chfainfo.com with your request.

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


5. 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	

6. assistance

If you have any questions about Insight, please contact your CHFA Commercial Loan Servicing representative 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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800.877.chfa (2432)

western slope

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