How to Create a Profile and Start an Application

Whether you are applying for your own organization or on behalf of a third party, you must create a profile in the CMHC Portal before you can submit an application to CMHC.

If you already have a profile in the CMHC Portal, select on **Changes to the application process for existing CMHC Portal users** found in the Table of Contents.

Table of Contents

Step 1 – Create your profile	2
Step 2 – Fill in your information	4
Step 3 – Link your profile to your organization	5
Step 4 – Start the application	8
Assigning an application to someone else	11
Accessing or reviewing your application	14
Managing Contributors or uploading documents	15
Applying as a third party on behalf of someone else	17
Changes to the application process for existing CMHC Portal users	18

For specific questions not covered in this guide, please contact your regional CMHC specialist.



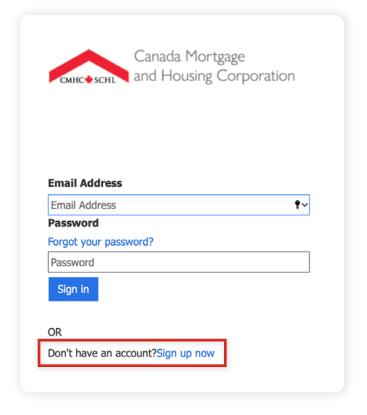




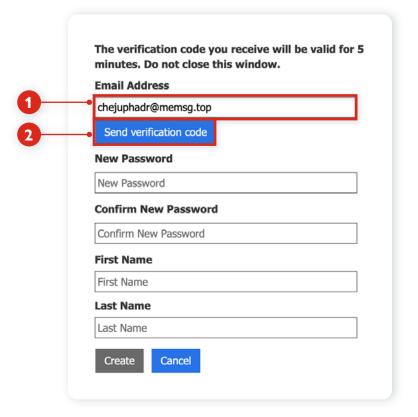
STEP 1 Create your profile

To create a profile, select the **Apply Today** link under any initiative on the CMHC website, or go directly to the CMHC Portal.

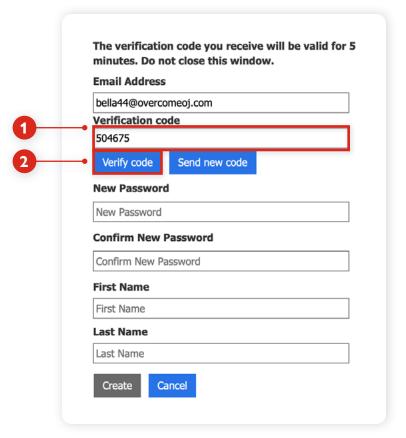
Select Sign up now.



Enter your **Business Email Address** and select **Send Verification Code**. A verification code will be sent to the email address you provided.



Enter the verification code you received and select **Verify Code**.

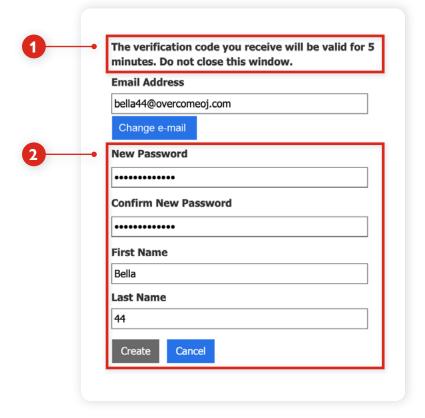


Once the code has been verified, create your **Password** according to the following rules.

Enter your **First Name** and **Last Name** and select **Create** to create your new profile.

NOTE: you will have five minutes to complete your registration.

8-16 characters, containing 3 out of 4 of the following: Lowercase characters, uppercase characters, digits (0-9), and one or more of the following symbols: @ # \$ % ^ & * - _ + = [] {} |\:',?/`~"();.



STEP 2

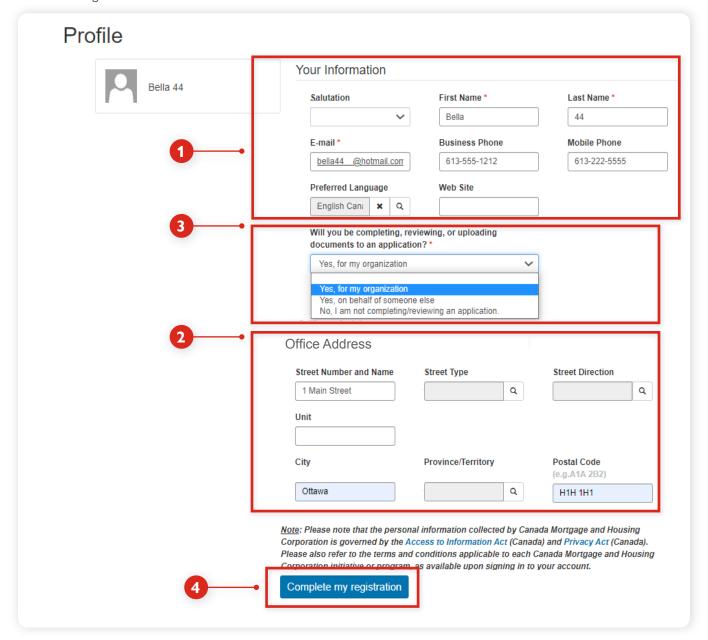
Fill in your information

Once your profile has been created, enter your **Contact Information** and **Office Address** (your office address, not the address of the organization you're applying for). Then indicate whether you are completing, reviewing or uploading* documents to an application by selecting one of the following three options from the drop-down menu:

- Choose "Yes, for my organization" if you're submitting or reviewing an application for your own organization or assigning an application to someone else.
- Choose "Yes, on behalf of someone else" if you are a third party submitting an application on behalf of an organization.
- Choose "No, I am not completing/reviewing an application" if you aren't submitting or reviewing an application. Please contact your CMHC representative if you fall in this category.

Once you've filled in your information and answered the application question, select Complete my registration.

*Select one of the Yes options if you have been added as a contributor. See Managing Contributors or uploading Documents for additional guidance.

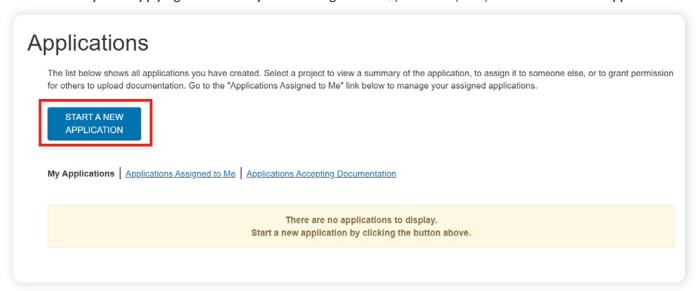


STEP 3

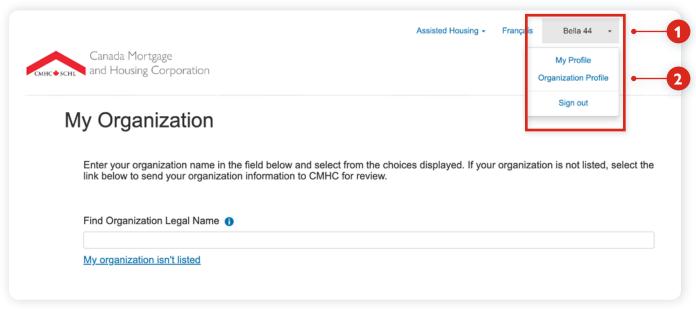
Link your profile to your organization

To complete your registration, link your individual profile to your organization in the Portal, and fill in the required information. This process varies slightly depending on whether you're applying for your own organization, or on behalf of another organization.

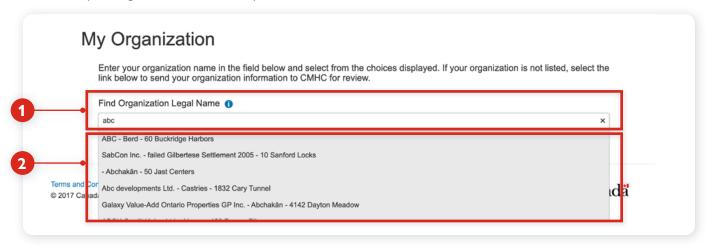
Scenario 1: If you're applying on behalf of your own organization, you will be prompted to Start a New Application.



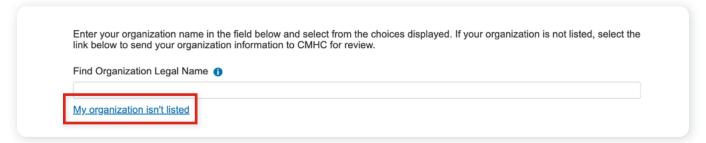
Scenario 2: If you're applying on behalf of someone else, select on Your Name in the top-right corner, then select Organization Profile.



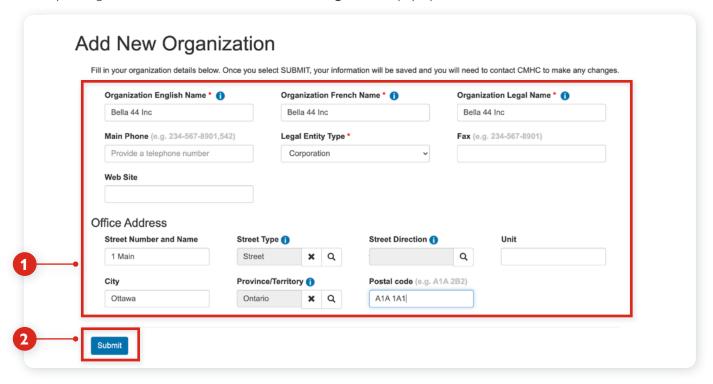
When the **My Organizatio**n box opens, enter the name of your organization in the **Find Organization Legal Name** field. Then select your organization from the drop-down list.



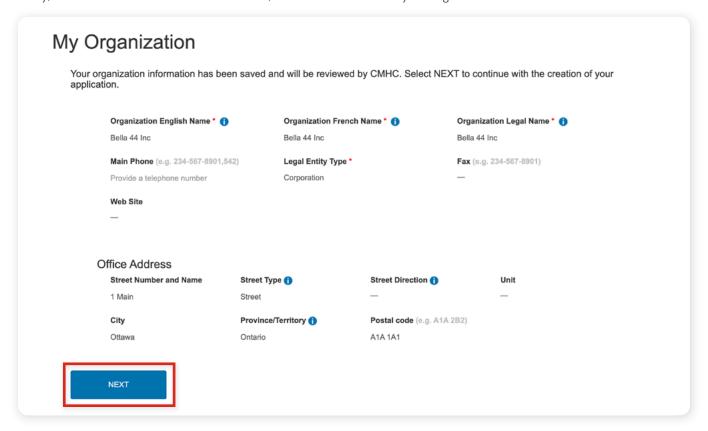
If you can't find your organization in the drop-down menu, select My organization isn't listed to add a new organization.



Enter your organization's information in the Add New Organization pop-up box, then select Submit.



Lastly, review that all the information is correct, and select **Next** to add your organization to the Portal.

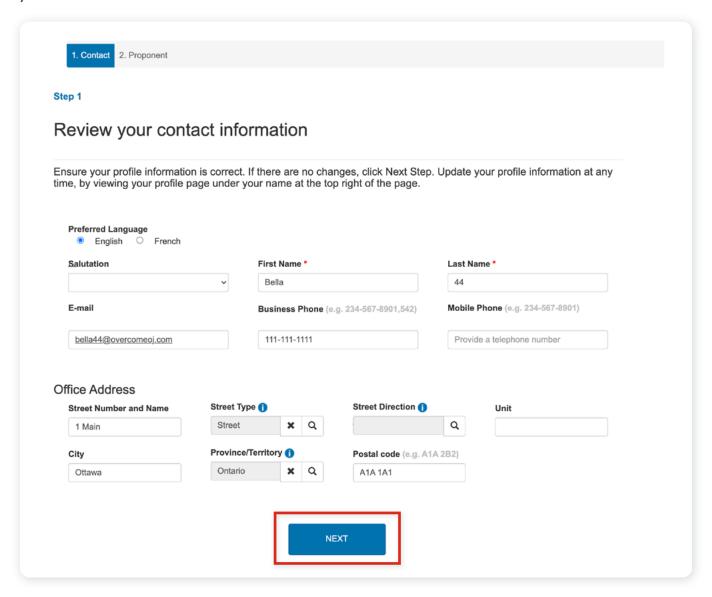


PLEASE NOTE: To protect your privacy and make sure you receive communications, approvals and/or payments from CMHC in a timely manner, your organization's profile will be placed on hold until CMHC can validate the Legal Name and other information and make any necessary changes. While you wait for your organization to be approved, you can still start the application process, or assign it to another CMHC Portal user if required.

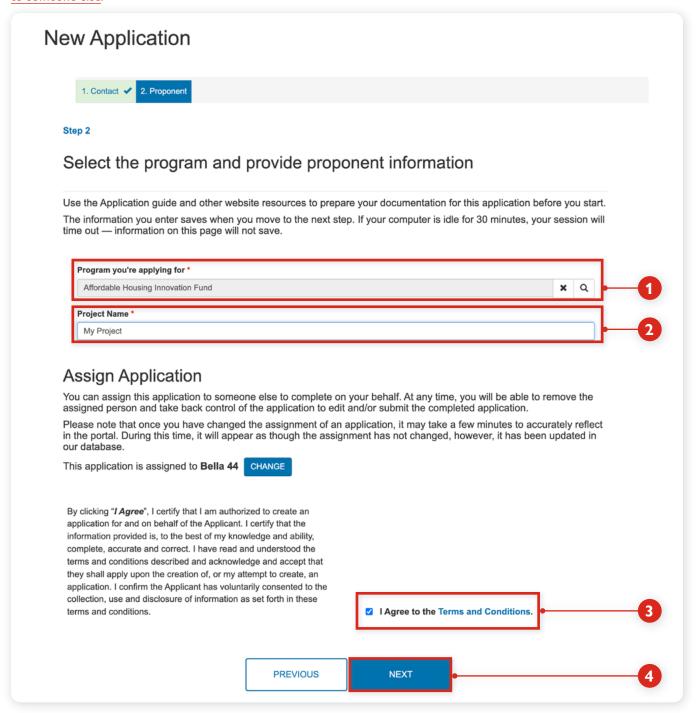
STEP 4

Start the application

Your registration is now complete, and you're ready to start the application process! If you're applying for someone else, please skip to Applying as a third party on behalf of someone else. If you're applying for your own organization, Review your contact information and then select Next.



In the **New Application** screen, select the **Program you're applying for** from the drop-down box. Enter your **Project Name,** read and then check the box to agree to the **Terms and Conditions**. Then select **Next**. If your organization exists, you will be able to continue with completing your application. NOTE: Before selecting next, you can <u>Assigning an application</u> to someone else.



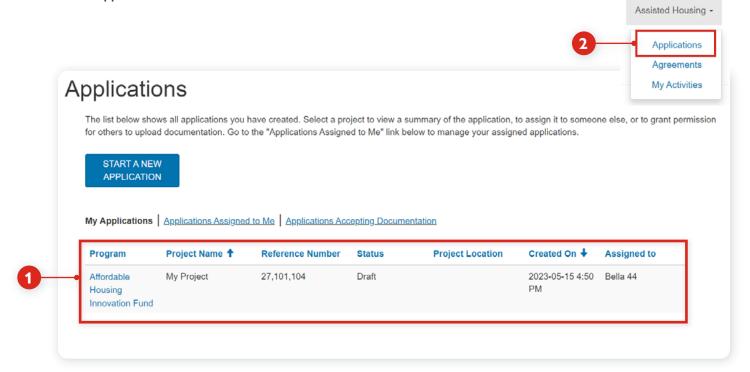
NOTE: The following pop-up box will appear if you have created a new Organization entry in the CMHC Portal, to remind you that CMHC still needs to review and approve your organization before you can continue. If your Profile has not been approved within 24hrs, please contact your CMHC Specialist.

The organization verification for this application is pending. Once approved you will be able to continue.

RETURN TO APPLICATION

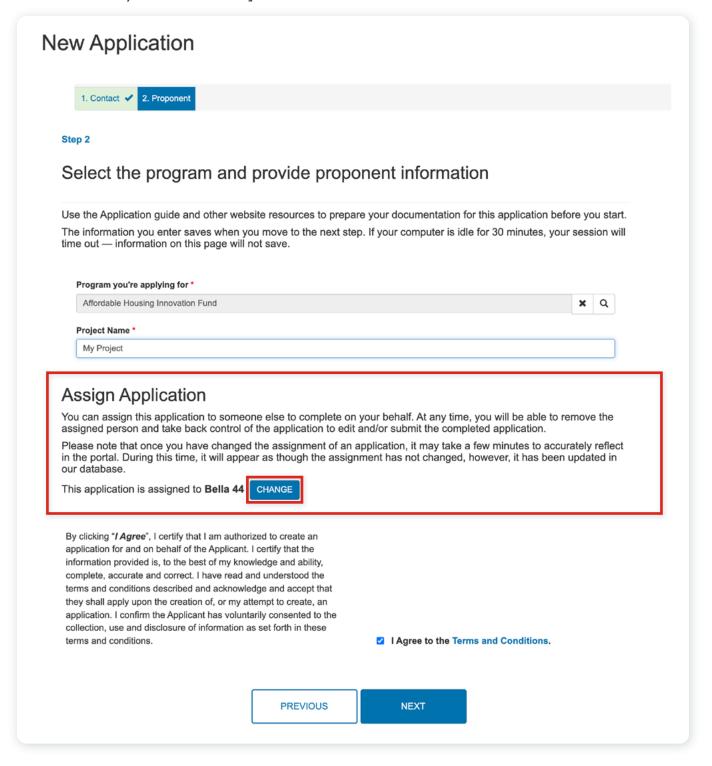
Continue to fill in the application details which vary by program. Visit Funding Programs for details on how to complete an application for a specific program.

Until your organization has been verified and approved, your **Application Page** will open, where you can confirm that your draft application has been created. Or select the **Assisted Housing** menu option and then **Applications** to return to the **Applications** list.

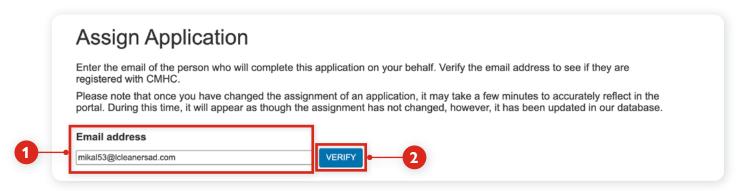


Assigning an application to someone else

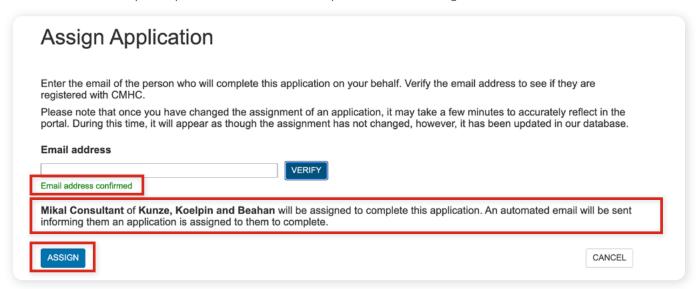
If you want to assign the application to another CMHC Portal user, before selecting "Next" in the **New Application** screen, select on **Change** in the **Assign Application** box and follow these steps. [NOTE: You can also assign the application to another user anytime at a later date.]



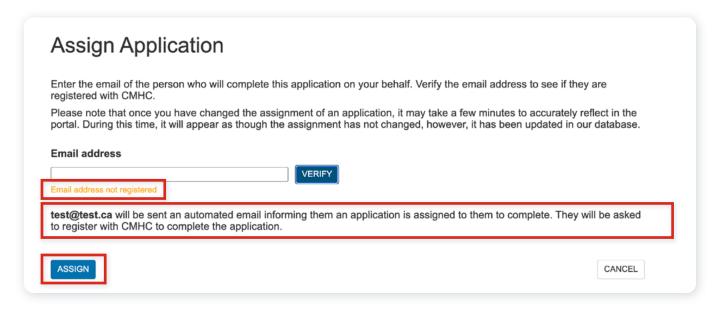
First, enter the email address of the user you want to assign the application to, and select Verify.



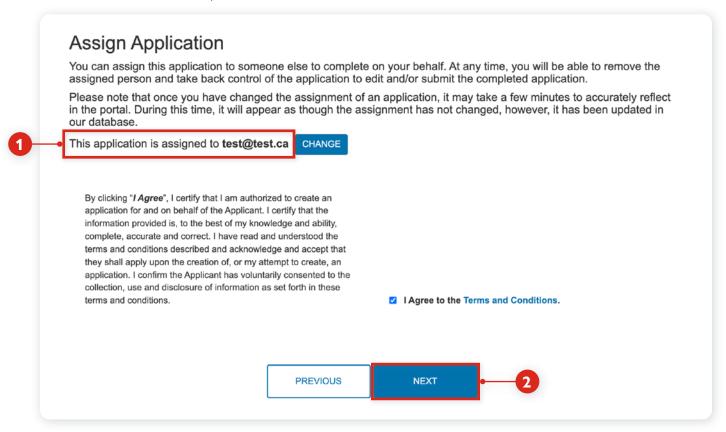
If the other user already has a profile on the CMHC Portal, you will see this message:



If the user you're assigning the application to doesn't have a CMHC Portal profile, they will receive an email asking them to create a profile. Once their profile is active, they will be able to access the application.



Once you've assigned the application to another user, their email address will appear in the **Assign Application** field. Confirm that the email address is correct, then select **Next**.

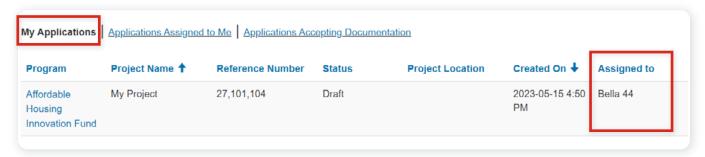


NOTE: The following pop-up box will appear if you have created a new Organization in the CMHC Portal, to remind you that CMHC still needs to review and approve your organization before you can continue.

The organization verification for this application is pending. Once approved you will be able to continue.

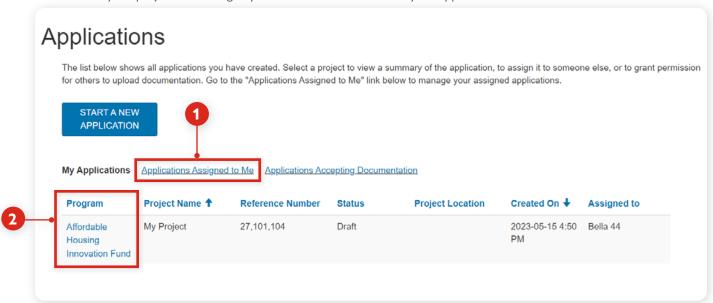
RETURN TO APPLICATION

Otherwise, if everything has been verified and approved, the **My Applications** page will open, where you can review your application and verify who it has been assigned to.



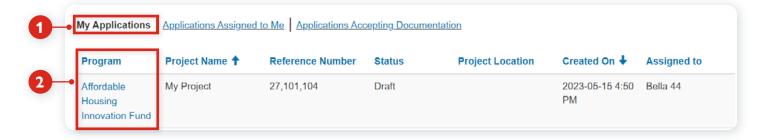
Accessing or reviewing your application

To access your application in progress, select on **Applications assigned to me**, then select on the name of the **Program** associated to your project. This will give you access to edit and submit your application.



To review an application, re-assign an application or add/modify a contributor, select on **My Applications**, then select on the name of the program.

NOTE: If you assigned the application to another user, you will have Read-Only access.



Select on the **Change** button at any time to assign the application to a different user, or select **Assign to Me** to retrieve full access to the application for yourself, or select **Manage Contributors** to add/modify contributors.

Review the Managing Contributors or uploading documents for details.



Managing Contributors or uploading documents

A contributor has the ability to upload attachments to an application. They cannot see any information regarding the application, only the attachment(s) they choose to upload.

To add or modify a contributor to your application, the application must first be created. The contributor will be able to see and upload documents when the application is submitted.

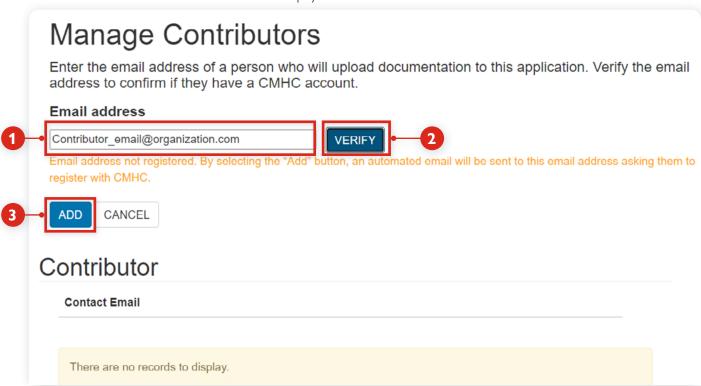
To add a contributor, select **My Applications**, then select the application you wish to add a contributor to. Select **the Manage Contributors** button.



From the **Manage Contributors** page, enter the email address of the contributor you want to assign to the application. Select the **Verify** button. If the contributor doesn't have a Portal profile, they will receive an email asking them to create a profile. Once their profile is active, they will be able to upload attachments to the application.

If the contributor already has a profile, the following will be displayed: Email address confirmed.

Select the Add button. The contributor will be displayed in the Contributor section.



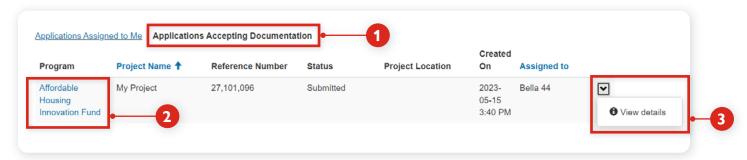
To delete a contributor from the list, select the arrow at the end of the row, then select **Delete**.



Uploading documents as a contributor

If you have been added as a contributor, you will receive an email asking you to create a profile. Follow the steps in this guide to create your Portal profile.

Select on the **Applications Accepting Documentation**. Select the link under **Program**, or the arrow at the end of the row and then **View details**.



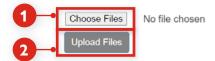
From the **Attached documents** section, **Choose the file(s)**, then select the **Upload Files** button. Once you've uploaded a document, to remove a document you will need to contact the application owner.

The uploaded document(s) appear in the **Add Documents** section.

Attached Documents

Please ensure the documents uploaded are for the applicable agreement and have a descriptive file name.

Attach Files (maximum size 10 MB per file. The attachments must be in the formats PDF, DOC, DOCX, PPT, PPTX, TXT, JPG, JPEG, PNG, XLS, XLSX.) Note: Attached document(s) can be removed only within 24 hours from the time attached



Add Documents



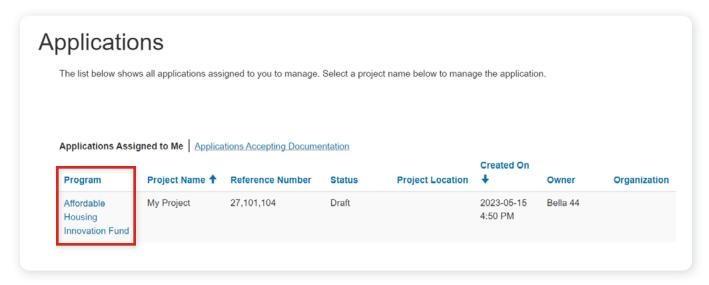
Applying as a third party on behalf of someone else

If you're submitting an application to CMHC on behalf of someone else, they must create the application as outlined in this guide and then assign it to you. As a third party, you will not be able to create the application yourself.

If an application has been assigned to you, you will have full access to work on the application. The person who created the application and assigned it to you (the "creator") will have Read-Only access. But the creator can re-assign the application to either themselves or another CMHC Portal user at any time.

NOTE: If you can't see the application in the Portal, contact the organization who hired you to submit the application for them, to make sure they have created the application and assigned it to you.

To access an existing application(s), select on the Program name link of the application you want to work on or review.



Changes to the application process for existing CMHC Portal users

To continue to protect your privacy and make sure you continue to receive communications, approvals and/or payments from CMHC in timely manner, CMHC has made several changes to the way existing users can create a profile in the Portal, and access or submit applications to one of our programs. If you have any questions about these changes or your application that aren't covered below, please contact your regional CMHC specialist.

What's new?

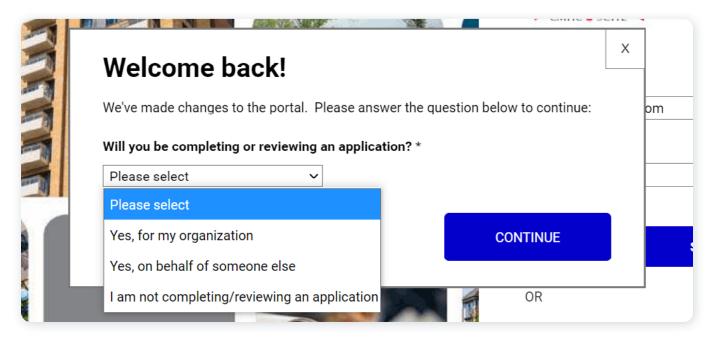
If you want to authorize someone to submit an application on behalf of your organization, if you're assigning an application to someone else within your organization, or if you want to add a document contributor, you must create the application yourself first and then assign it to another CMHC Portal user (or add a document contributor). This change lets you track the progress of your application(s) and gives you more control over who can work on it, including the ability to retrieve or re-assign the application at any time.

If someone has assigned an application to you to complete on their behalf, or assigned you as a document contributor, you can now find it automatically when you sign in the CMHC Portal.

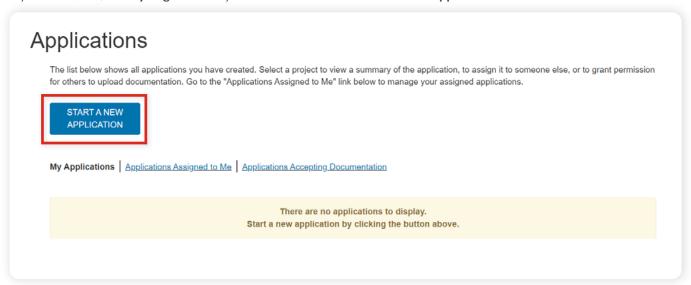
In addition, when logging into the new Portal for the first time, you will have to select one of the following three options from the drop-down menu:

- Choose "Yes, for my organization" if you're submitting or reviewing an application for either your own organization, or assigning an application to someone else.
- Choose "Yes, on behalf of someone else" if you are a third party submitting an application on behalf of an organization.
- Choose "I am not completing/reviewing an application" if you aren't submitting or reviewing an application. Please contact your CMHC representative if you fall in this category.

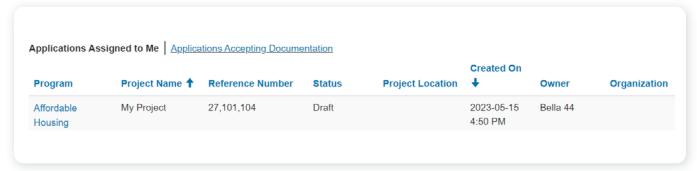
Note: You must select one of the Yes questions if you have been added as a document contributor.



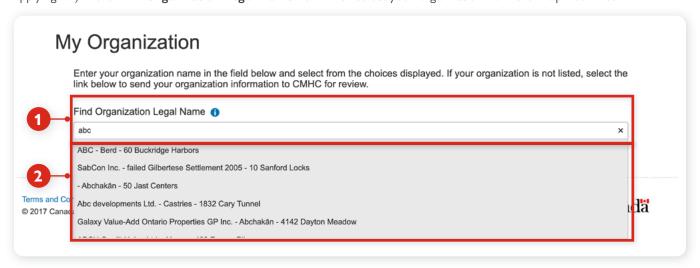
If you select, Yes, for my organization you will be able to select Start a new application.



If you select, Yes, on behalf of someone else, you will see the applications assigned to you.



If the **My Organization** box opens, enter the name of your organization (your own organization, not the organization you're applying for) in the **Find Organization Legal Name** field. Then select your organization from the drop-down list.



If your organization isn't listed in the drop-down menu, please refer to how to Link your profile to your organization.

To assign an application, go to Start the application.