



FHLBI.GIVES
Community Impact
Member User Guide

Community Investment Program

User credentials are issued after receipt of the FHLBI.GIVES – Online Application User Registration Form. Upon logging in, the user will land on the home page as seen below.

PROJECTS	
	<input checked="" type="checkbox"/> Current Year <input type="checkbox"/> All Years
# Approved Projects	1
\$ Approved	\$ 1,000,000.00
\$ Disbursed	\$ 1,000,000.00
\$ Remaining	\$ 0.00
\$ Member Maximum	\$ 50,000,000.00

MY TASKS	
Unsubmitted Applications	0
Returned Applications	0
Approval Letters	0
Disbursement Documentation Requests	0

BEGIN APPLICATION

Community Investments Program
Click here to start an application for Community Investments Program advances or letters of credit.

[CHECK APPLICATION STATUS](#)

BULLETIN BOARD

No Data Found

HOME PAGE:

Here you will find access to all current and past applications, submitted or unsubmitted through FHLBI.GIVES. The home page sections include:

My Tasks:

Application information and reminders can be found here

- Unsubmitted Applications – Applications that you personally have saved but not submitted to your Authorized Signer or FHLBI can quickly be picked up here. Any edits to applications must be done by picking up the application here, not in the My Portfolio section at the top.
- Returned Applications – Any submitted applications returned by your Authorized Signer or FHLBI can be picked up here.
- Approval Letters – Approval letters for all approved applications.
- Disbursement Documentation Requests – If your project has documentation that is due, such as a homeownership log, you can open the application here, attach the documents and submit to FHLBI.

Begin Application:

Start, continue, or find the status of an application here

- New application – Click on the orange icon to begin a new application
- Application Status – Click on the blue button center of page to see a listing of applications and where they are in the process.

Projects (right of the picture):

Listing of approved projects and the balance of funding your institution has remaining in the program for the current year.

Community Investment Program

Bulletin Board:

General messages posted by FHLBI to be seen by all members.

[Home](#)

[My Portfolio](#)

[Messages](#) 0

[Resources](#)

[Logout](#)

Home Page Ribbon:

- Home will take you to the home page from any location
- My Portfolio – Hovering over this will bring up two selections: Applications and Projects
 - Applications – will provide a listing of all your personal applications as a submitter. Authorized signers can see all applications for your institution
 - Projects – will provide a listing of all your approved applications as a submitter. Authorized signers can see all projects for your institution.
 - Clicking on either will give you lists that you can search or sort and will provide an access point to open an application or project.
 - At the bottom of the page, you can click a button to start a new application so you don't have to go back to the home page to do this.
- Messages – Retrieve personal messages from FHLBI here
- Resources – Direct links to documents and the FHLBI website can be found here
- Logout – End your session by logging out

STARTING AN APPLICATION See next page →

Community Investment Program

Starting a New Application

1. Click on the orange housing logo under 'Begin Application' in the lower-center of the homepage
2. Enter Credit Information for the project (you can tab through each page to enter data)
 - a. When borrowing using an ADVANCE:
 - i. Select Advance;
 - ii. Follow prompts entering information for each piece of data;
 - iii. Once completed hit Save, or Save & Continue at the bottom of the screen to go to the next page.
 - b. When borrowing using a LETTER of CREDIT:
 - i. Select Letter of Credit;
 - ii. Follow prompts entering information for piece of data;
 - iii. Once completed hit Save, or Save & Continue at the bottom of the screen to go to the next page.
3. Enter Contact information
 - a. The person logged in is automatically entered as a contact.
 - b. Click the "Add New" button in the bottom right to enter an additional personal contact if needed. Save, then hit the Next button in top right corner.
4. Enter Project Information
 - a. On this page you will enter information including:
 - i. Project Name
 - ii. Project Type
 1. Ownership Residential
 2. Rental Residential
 3. Commercial and Economic Development
 4. Multi-Use Development (rental residential and commercial project)
 - iii. Location Type
 - iv. Scattered Site
 1. YES – if project has more than one address – this typically only applies to ownership residential
 - v. Borrower Status
 1. Ownership residential will select Other and input "Mortgage Portfolio" in explanation box.
 - vi. You must hit Save before entering the Project Location information
 - vii. Project Location – Hit Add New button in bottom right corner. Input address information for the project including census tract. There is a link to help identify the specific tract for your address. Click the link, go to the Consumer Compliance header in the middle of the page, select Geocoding/Mapping System, type the address at the top of the page, results will show at the left. ****If you need to edit the address, hit the pencil in the Action column, to edit the county you must first change/re-enter the State.**
 - viii. Once location information is in, save and close the pop-up, then hit Next
5. Enter Borrower Information (entity or individual owners, not needed for Ownership Residential)

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- a. Click 'Add New' to the right;
 - b. Enter your borrower information
 - c. Save and click Next
6. Enter Project Financing Information
- a. Credit Type
 - i. Advance – Project Specific or Loans to be closed
 1. To be selected if your loan with your client has not closed yet (rental or commercial) enter expected date of closing
 - ii. Letter of Credit Enhancement
 1. For all Letter of Credit projects
 - iii. Advance Portfolio Funding
 1. To be selected if your project is already in your portfolio or, if this is an ownership residential project
 - b. Purpose of Financing
 - i. Enter the most accurate selection for the purpose of your funding
 - c. Other Funding Sources
 - i. Select any of the listed funded sources that apply to your project
 - ii. Hit Save and Continue
7. Additional Information
- a. Rental Residential
 - i. Enter the number of Rental Units whether the qualification is based on tenant income or rents (see the description at top of the page). Enter the information based on your selection. Enter a description of the property.
 - ii. Click the Red Attach Documents button to the right – attach rent roll or income qualification reports
 - iii. Hit Save and Continue
 - b. Ownership Residential
 - i. Enter the number of mortgages proposed to be funded. Attach mortgage listing, if available, by clicking the red Attach Documents button to the right. Answer additional question about special programs.
 - ii. Hit Save and Continue
 - c. Commercial and Economic Development
 - i. Follow the instructions to select the qualification of your project
 - ii. Complete all requested information
 - iii. Attach jobs listing if using wage levels as a qualification.
 - iv. Once complete with this section hit Save and Continue
8. Review and Finalize
- a. Review the application information – Use the Prev button in the top right or use the buttons on the left of the page.
 - b. If any required information was not provided you will see a list in red at the bottom left. Click on the item and it will take you directly to the missing information.
 - c. When all information has been provided, click the Certification button. Submitters must certify before sending to an authorized signer, and authorized signers must certify before sending the application to FHLBI.
 - d. You may also print the application at this point if you need to.

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TIPS:

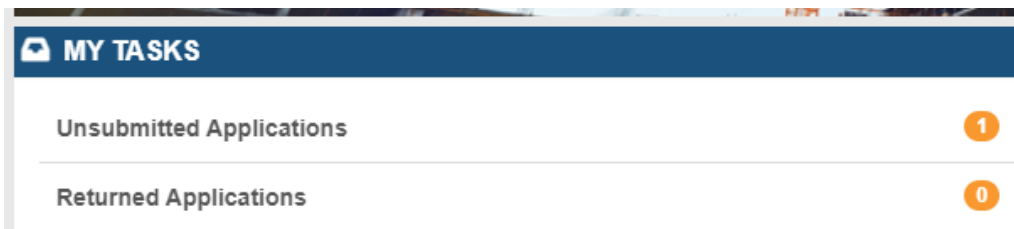
1. You can attach supporting documents at any time, click the documents tab to the right.
2. If you cannot move to the next page, something is missing on the current page. Look for the red asterisk*, or click the save button at the bottom of the page.

Application Submission

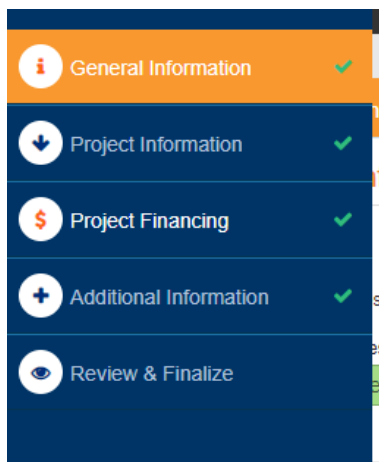
Once the application information has been completed, the submitter will forward the application to an Authorized Signer within their institution.

The Authorized Signer will get an email notification that an application is awaiting their approval in .GIVES.

Upon opening .GIVES, under My Tasks, they will see the Unsubmitted Applications area. Click on the number and a listing of any unsubmitted applications will show. Click on the application number to pull up the application for review.



At this point the Authorized Signer can review every stage of the application by clicking on the icons on the left-hand side.



To finalize and submit, go to the Review and Finalize section. Click on the certification button and attest to the standard program certifications. The Authorized Signer can return the application to the submitter for correction or submit the application to FHLBI. Upon qualification by FHLBI, an approval letter will be issued for the project.

Documents and help can be found at: www.fhlbi.com/cip