



- Correspondent Lending
- Housing Finance Agency (HFA)

## Summary

**In U.S. Bank B-2020-17 published mid-September**, we announced that as a result of vendor relationship and acquisition changes, Ellie Mae is in the process of making various updates and upgrades to the DocVelocity web client, including an overall rebranding of the naming convention to Ellie Mae AIQ (AIQWeb). As part of the HFA loan delivery process, U.S. Bank requires loans to be submitted electronically with image-based digital mortgage loan folders using the DocVelocity Imaging System.

**Training and Support:** As a reminder, and as mentioned in our previous communication, we now have additional training and support resources ready to support this initiative scheduled for implementation on October 10, 2020 as outlined below.

- **Live Training Sessions** – if you would like to sign up for one of the live training sessions below, please email us at [HFADocVelocityAssistance@usbank.com](mailto:HFADocVelocityAssistance@usbank.com):
  - Friday, October 16<sup>th</sup> at 10 am (CT), or
  - Friday, October 23<sup>rd</sup> at 1 pm (CT)
- **Recorded Training Availability** – if you are unable to attend one of the live trainings listed above, you may also utilize the recorded training [here](#).
- **HFA DocVelocity Client User Manual** – the updated manual will be available on October 10<sup>th</sup>.

## Summary of Upgrades and Updates Coming Soon

These upgrades will help capture the industries move away from development options that require third party browser plug-ins. The Adobe Flash plugin will no longer be supported or available on web browsers after 2020. HTML5 is the development platform that is being used for structuring and presenting content on web pages. Once the upgrades and updates are implemented, currently scheduled for October 10, 2020, DocVelocity Web Client users will have the same functionality as you do today, with some large differences in the interface itself including overall visual branding updates and more.

Category	Change/Location	Details
General Navigation	DocVelocity Folders Screen Updated	<ul style="list-style-type: none"> <li>• After login, the first screen is the DocVelocity Folders screen. There are 4 main screens available for access in DocVelocity:</li> <li>• Folders, Collaboration (formerly Threads), Queues, and Inboxes</li> </ul>
File Submission	New functionality added to Drag and Drop Files	<ul style="list-style-type: none"> <li>• Users can now 'Drag and drop the files to the Drop files field or Click Browse to add attachments.'</li> </ul>
	Updated process to select <i>Inboxes</i> from the Navigation dropdown (the HFA DocVelocity Client User Manual will be updated with new screen shots)	<ul style="list-style-type: none"> <li>• Select <i>Inboxes</i> from the Navigation dropdown; On the <i>Inboxes</i> page, click <i>Submit to Inboxes</i>; Multiple inboxes are listed. Enter <i>Housing Finance Agency Inbox</i> into the Search feature and open the inbox.</li> <li>• Submitting to the <i>Housing Finance Agency Inbox</i> is <b>critical</b> for loan delivery. No other inbox will deliver your loan to the correct area of U.S. Bank to review the loan for purchase; Click <i>New Submission</i>.</li> </ul>
Collaboration (formerly Threads)	Threads renamed to Collaboration	<ul style="list-style-type: none"> <li>• The DocVelocity Collaboration portal (formerly thread) system is used for confidential and secure communication with our HFA lending partners.</li> </ul>
Responding to Deficiency Notices	Threads renamed to Collaboration	<ul style="list-style-type: none"> <li>• After selecting the correct document to rectify a deficiency notice, the documents are delivered to us through the Collaboration (formerly Thread) Portal.</li> </ul>

## Questions



**HFA:** Please contact the Housing Finance Agency Hotline at 800.562.5165, option 1 for the HFA Customer Care Team.

