



- Correspondent Lending
- Housing Finance Agency (HFA)

### Summary

With the implementation of Lender Portal now complete, U.S. Bank will offer Lender Portal Lender Administrator and User training sessions on **August 19<sup>th</sup> – 23<sup>rd</sup>** to provide additional opportunities for lenders who may have missed a scheduled session or would like to attend for further training. **Please refer to the information below which includes training links, as registration is not required.**



### Additional Lender Portal Training Opportunities

#### Lender Administrator and User Training

Lender Administrators are responsible for setting up all users and their associated permissions within Lender Portal. Lender Administrators can use Lender Portal for a variety of administrative needs, including the creation and maintenance of Lender users. Once Lender Administrators have completed training, they will be responsible for also issuing additional training opportunities to your organization for other role-based functionality.

In addition to Lender Administrator training, additional training opportunities for other role-based functionality within Lender Portal including Seller Administrator, Manager, Lender Processor, Loan Officer and Seller Guide are available. This is an end-to-end training highlighting each role within the Lender Portal and the user experience including:

- Loan reservation, creating/registering a single loan as well as loan cancel.
- Submit credit package and or closed loan package for purchase.
- Conditions are listed inside of the loan and may be easily submitted for review.
- AllRegs, training material and communication pertinent to the Lender Portal.

#### Upcoming Lender Portal Administrator and User Training Information

Dates	Time (Central Time)	Training Link (no registration required)	Unable to click the Training Link? Go to: <a href="https://www.microsoft.com/microsoft-teams/join-a-meeting">https://www.microsoft.com/microsoft-teams/join-a-meeting</a> Enter the Meeting ID and Passcode.
8/19/2024 8/21/2024 8/23/2024	11 am CT	<a href="#">Click here to join the meeting</a>	Meeting ID: 263 444 002 093 Passcode: nrrwnNB
8/20/2024 8/22/2024	3 pm CT	<a href="#">Click here to join the meeting</a>	Meeting ID: 275 068 587 682 Passcode: iQrsrh

### Additional Resources

As a reminder, if you're not able to attend live training, please note that we have a wide array of recorded trainings and training materials in the Lender Portal itself.

Simply login, click on Resources on the left navigation menu and then click on Additional Resources. You'll find a variety of resources awaiting you including quick reference guides, job aids and more.

### Questions



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

