



Correspondent Lending

HFA Lending

Summary

U.S. Bank Lender Portal is currently experiencing the following technical difficulties:

System Impact	Status	Additional Details
<p>Existing Issue</p> <p>Password reset email is not being received by users.</p>	Open	The Lender Portal password reset email functionality continues to not perform as expected when a user attempts to reset their password.

Alternative Solutions

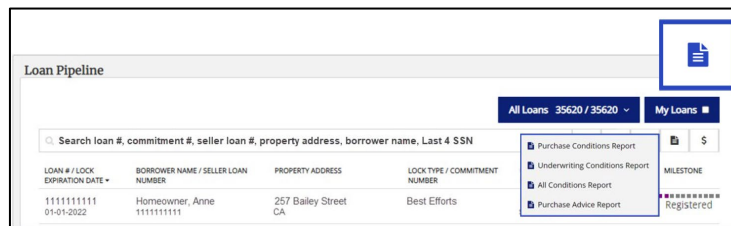
We do not currently have an alternative solution available for this issue. If you have an urgent need, please reach out to our Client Support teams so that we may assist you.

System Impact	Status	Additional Details
<p>New Issue</p> <p>Email notifications from Lender Portal are not being sent.</p>	Open	<p>The email notifications functionality is <u>not</u> sending out email notifications for the following areas:</p> <ul style="list-style-type: none"> • Purchase Conditions/Decision • Purchase Advice • Underwriting Conditions/Decision • Appraisal Approval Required/Conditions

Alternative Solutions for users who can access Lender Portal

Conditions Reporting

In the interim and as an alternative solution, lenders may access **Conditions Reports** by clicking on the **Report** icon on the loan pipeline page to select a report to be generated as shown below:



When these options are selected, the report will automatically download:

- Purchase Conditions - includes outstanding and pending conditions.
- Underwriting Conditions – includes outstanding and pending conditions.
- All Conditions - includes loans with all corresponding milestones for both Purchase Conditions Report and Underwriting Conditions Report.

Report Download

Once a selection has been made, the system shows a confirmation banner indicating the report has been requested and will be downloaded; the system will show a confirmation banner when the download is complete, and report is ready to be viewed.



Alternative Solutions, Continued

Alternative Solutions for users who can access Lender Portal

Purchase Advice Report

Lender Portal users can generate and download a PDF version of the purchase advice(s) for a loan number or purchased date range entered.

To create a Purchase Advice Report:

1. Click **Reports** icon (*shown below*)
2. Click **Purchase Advice Report**

The screenshot shows the 'HFA Pipeline' interface. At the top, there are tabs for 'HFA Reservations' and 'HFA Loans'. A search bar is present with the text 'Search HFA Loan Number, Reservation ID, Loan #, Seller Loan #, Property Address, Borrower Name, Last 4 SSN'. Below the search bar is a table with columns: 'LOAN # / HFA LOAN NUMBER', 'BORROWER NAME / SELLER LOAN NUMBER', 'PROPERTY ADDRESS', 'SELLER NAME / SERIES CODE', 'CONDITIONS / LOAN AMOUNT', and 'INTE TYPI'. A dropdown menu is open over the table, showing options: 'Purchase Conditions Report', 'Underwriting Conditions Report', 'All Conditions Report', and 'Purchase Advice Report'. The 'Purchase Advice Report' option is highlighted with a blue circle and the number '2'. A blue circle with the number '1' is also present near the search bar.

1. Complete **Loan Number** field or fill in date range fields to find specific **Purchase Advice** letter.
2. Click **Generate Report**.
3. A message, "Success. Report has been generated." will display and the requested report, along with a history of previously requested reports will be available.
4. Click **Download**.

The screenshot shows the 'Purchase Advice Report' interface. At the top, there are fields for 'Loan Number' (with a blue circle '1' and the value '1111111111'), 'Purchase Date From' (with a blue circle '2' and the value '12/05/2022'), and 'Purchase Date To' (with the value '12/29/2022'). A 'Generate Report' button is visible. Below the form is a table with columns: 'LOAN NUMBER', 'PURCHASE DATE FROM', 'PURCHASE DATE TO', 'DATE/TIME OF REPORT GENERATED', and 'GENERATED BY'. The table contains two rows of data. The first row shows a loan number '2222222222', purchase date from '12/05/2022', purchase date to '12/29/2022', date/time '12/29/2022 12:26 PM', and generated by 'Lender Processor'. The second row shows a loan number '2222222222', purchase date from '12/29/2022', purchase date to '12/29/2022', date/time '12/29/2022 11:05 AM', and generated by 'Processor No Pricing'. A blue circle '3' is next to the second row, and a blue circle '4' is next to the 'GENERATED BY' column. A blue message box at the bottom says 'Success. Report has been generated.' There are 'Download' and 'Delete' buttons for each row.

Purchased Loan Report

Lender Portal users can generate and download an Excel version of purchased loans for a date range entered.

To create a Purchased Loan Report:

1. Click **Purchased Loan Report** icon (*shown below*).
2. Enter **Date From** and **Date To** time frame (not to exceed 90-days).
3. Click **Apply Filters** to download.

The screenshot shows the 'Loan Pipeline' interface. At the top, there are tabs for 'All Loans 35620 / 35620' and 'My Loans'. A search bar is present with the text 'Search loan #, commitment #, seller loan #, property address, borrower name, Last 4 SSN'. Below the search bar is a 'Filter By' section with 'Date From' (with a blue circle '2' and the value '01/24/2024') and 'Date To' (with the value '01/24/2024'). A blue circle '3' is next to the 'Apply Filters' button. A blue circle '1' is next to the search bar.

Questions

If you have an urgent need, please reach out to our Client Support teams using the contact information below so that we may find the best means to assist you. We apologize for any inconvenience.



Correspondent: Please contact your Account Executive or the Client Support Area at 800.200.5881, option 1.

HFA: Please contact the Housing Finance Agency Hotline at 800.562.5165, option 2 for the HFA Client Support Team.
