



Program Update

TO: Participating Lenders
FROM: NIFA Homeownership Team
DATE: February 1, 2019
SUBJECT: Program Update #19-06, DocVelocity Transition

NIFA is sending this update to remind everyone of the February 1, 2019 implementation date for the DocVelocity loan delivery system. We encourage all team members responsible for shipping closed loans to U.S. Bank Home Mortgage (“USBHM”) to participate in one of the refresher training webinars. Page 3 contains details regarding upcoming training webinar dates and additional resources for DocVelocity.

Loan Reservations

Participating Lenders should continue to process loan reservations in NIFA’s Lender Online (“LOL”) system. It is extremely important to pay attention to the loan reservation date, as it will determine which system is necessary to deliver a closed loan to USBHM. The following table defines the appropriate delivery portal:

Loan Reservation Date	USBHM Delivery System
Prior to February 1, 2019	UniteUS
February 1, 2019 and after	DocVelocity

LOL Report to Help with Transition

During the transition period, NIFA encourages Participating Lenders to utilize the Current Stage Status Report available in the reports section of LOL. *Please note that users need an access level of either 1) **View Reports Only** or 2) **Lender** so that all loans in the pipeline are included on the report.*

The following is an example of the Current Stage Status Report outlining the parameters required to capture your entire loan pipeline. The sections highlighted in yellow require modification prior to generating the report.



Program Update

Update #19-06, DocVelocity Transition
February 1, 2019
Page Two

The screenshot shows a 'Report Wizard' interface for 'Current Stage Status'. It features several sections for filtering and sorting data:

- LENDERS/BRANCHES:** Includes an 'Add' and 'Remove' button.
- PROGRAMS:** Includes an 'Add' and 'Remove' button.
- STAGE STATUS:** Includes an 'Add' and 'Remove' button.
- OFFICERS:** Includes an 'Add' and 'Remove' button.
- STAGE:** Radio buttons for 'LAST STAGE' and 'ANY STAGE' (selected). Radio buttons for 'All' and 'Select' (selected).
- LOCK DATE:** A text box containing '(Same as Loan Reservation Date)' with an 'Add' and 'Remove' button.
- STAGE DATE:** 'From' date: 02/01/2019, 'To' date: 02/15/2019. Below is the text '(Loan Reservation Date Range)'. Includes 'Add' and 'Remove' buttons.
- TYPE OF REPORT / OPTIONS:** Radio buttons for 'Detailed' (selected) and 'Summarized'.
- SORT CRITERIA:** Three rows for 'Group by', 'Then by', and 'Then by', each with a '(none)' dropdown, sort order icons (A-Z, Z-A), and a 'Break Page' checkbox.

A 'Run Report' button is located at the bottom center of the form.

Stage: Choose the **ANY STAGE** radio button and the **Select** radio button. From the Selection options, choose Lock Date. Lock date is the same as the Loan Reservation Date.

Stage Date: Choose the Loan Reservation Date Range as applicable. Lenders should generate this report for all loans prior to February 1, 2019 to identify loans to deliver via UniteUS, and from February 1, 2019 forward to identify loans to deliver via DocVelocity.



Program Update

Update #19-06, DocVelocity Transition
February 1, 2019
Page Three

DocVelocity Resources

USBHM created a Client Resources folder that includes training information and job aids for the DocVelocity system. This information is available on their website at <https://hfa.usbank.com>. USBHM has also established DocVelocity Client User Training Dates as follows:

1. Tuesday – February 5th, 10:00 AM CST

- WebEx Link:
<https://usbankmeetings.webex.com/usbankmeetings/j.php?MTID=m2f80fee4cc9815686a70a3989c53eb77>
- Call in Number: 1-800-916-2280/Meeting Number: 809 763 566

2. Tuesday – February 12th, 2:00 PM CST

- WebEx Link:
<https://usbankmeetings.webex.com/usbankmeetings/j.php?MTID=m2f80fee4cc9815686a70a3989c53eb77>
- Call in Number: 1-800-916-2280/Meeting Number: 803 401 748

3. Thursday – February 14th, 11:00 AM CST

- WebEx Link:
<https://usbankmeetings.webex.com/usbankmeetings/j.php?MTID=m890e19a43431c16306bbea37533d8589>
- Call in Number: 1-800-916-2280/Meeting Number: 801 926 783

Additional training dates are available by contacting the HFA DocVelocity Team at hfadocvelocityassistance@usbank.com. If you have any questions, please contact the Housing Finance Agency Hotline at 800.562.5165, option 1 for the HFA Customer Care Team.

If you have any questions regarding Lender Online reporting functions, please reach out to any member of the NIFA Homeownership Team.