



MEMORANDUM

TO: NIFA Participating Lenders
FROM: Jacki Young, Chief Homeownership Officer
DATE: June 6, 2018
SUBJECT: Memo #18-21, UniteUS Implementation Date

NIFA is sending this Memorandum to remind everyone of the June 4, 2018 implementation date for the UniteUS loan delivery system. We expect that all team members responsible for shipping closed loans to U.S. Bank Home Mortgage (“USBHM”) have completed a user training webinar. Please contact our office as soon as possible if your company has not received training.

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 used to deliver a closed loan file to USBHM. The following table is an example:

Loan Reservation Date	USBHM Delivery System
Prior to June 4, 2018	DocVelocity
June 4, 2018 and after	UniteUS

LOL Report to Help with Transition

During the transition period, NIFA encourages Participating Lenders to utilize the Current Stage Status Report that is 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 so you can see what parameters to use to capture your entire pipeline of loans. The two sections highlighted in yellow need to be modified before running the report (e.g. choose the any stage option, select the lock date stage, and enter the appropriate loan reservation date range).



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Report Wizard for:

LENDERS/BRANCHES <input checked="" type="radio"/> All <input type="radio"/> Select <input type="text"/> Add Remove	OFFICERS <input checked="" type="radio"/> All <input type="radio"/> Select <input type="text"/> Add Remove
PROGRAMS <input checked="" type="radio"/> All <input type="radio"/> Select <input type="text"/> Add Remove	<input type="radio"/> LAST STAGE <input checked="" type="radio"/> ANY STAGE <input type="radio"/> All <input checked="" type="radio"/> Select LOCK DATE (Same as Loan Reservation Date) Add Remove
STAGE STATUS <input checked="" type="radio"/> All <input type="radio"/> Select <input type="text"/> Add Remove	STAGE DATE From: <input type="text" value="06/04/2018"/> To: <input type="text" value="06/05/2018"/> (Loan Reservation Date Range)
TYPE OF REPORT / OPTIONS <input checked="" type="radio"/> Detailed <input type="radio"/> Summarized	SORT CRITERIA Group by: (none) <input type="radio"/> A-Z <input type="radio"/> Z-A <input type="checkbox"/> Break Page Then by: (none) <input type="radio"/> A-Z <input type="radio"/> Z-A <input type="checkbox"/> Break Page Then by: (none) <input type="radio"/> A-Z <input type="radio"/> Z-A <input type="checkbox"/> Break Page

UniteUS Resources

USBHM created a client resources folder that includes training information and job aids for the UniteUS system. This information is available on their website at <https://hfa.usbank.com>. If you have any questions, please contact the HFA hotline by phone at 800.562.5165, option 2 or send an email to hfa.programs@usbank.com.

Thanks for your understanding and patience as we work through this transition period. Please don't hesitate to let us know if you need any assistance.