Account Info Tab

☐ **1.** To be paid via ACH, you will need to enter bank account information in this section.

Once the bank account has been verified, the ‘Payment Type’ field located on the ‘Loan Servicer Info’ tab will be automatically changed from ‘Check’ to ‘ACH’.

Please note that a Loan Servicer is able to enter more than one bank account. However, to eliminate confusion with the verification process specifically concerning multiple deposits, we recommend that you enter one bank account at a time and complete the verification process before entering additional bank accounts.

In addition, for risk mitigation purposes, there is a dual control built into the bank account verification process. This means that you will need to add at least one more Loan Servicer account user in the portal. This can be done through the ‘User’ tab.

☐ **2.** Click on the ‘Add Loan Servicer Account’ hyperlink located on the upper right-hand corner.

This will prompt open a window where you will be asked to enter the following information:

☐ a. Account Name

☐ b. Routing Number

☐ c. Account Number

☐ d. Account Type

☐ e. Purpose: Business/ Commercial

Once you have entered the bank account information, the account will display on the ‘Account Info’ screen with a ‘Verify’ button.

Please note that a micro-deposit will be made to the account within 1-3 business days from the account being added for verification.

This small credit deposit will have the identifier ‘Mortgage Verify’

☐ **3.** Once you have received the micro-deposit, return to the ‘Account Info’ tab and click on the ‘Verify’ button to verify the account.

As previously mentioned, there is a dual control built into the bank account verification process. Which means that the individual that enters/verifies the micro-deposit amount must be a different person than the person that added the bank account information into the portal.

☐ **4.** Enter the amount of the micro-deposit received with the identifier ‘Mortgage Verify’.

If you need to add additional accounts, proceed to enter the next one and complete the process again.

Users Tab

☐ **1.** If you would like to add additional users that will be helping with the administration of the Loan Servicer Portal, you can add them in this screen. Simply click on the ‘ + Add User’ hyperlink.

Please note that if you are requesting payment via ACH, you are required to add at least one user in order to complete the ACH account verification process.

☐ **2.** Once you click on the ‘+ Add User’ hyperlink, a window will open where you will be required to enter the information below for each additional user:

- ☐ a. First Name
- ☐ Last Name
- ☐ Email Address
- ☐ Phone Type
- ☐ Phone Number

☐ **3.** After you have entered the user, their name and information will display on the ‘Loan Servicer User’ screen. You will also notice an ‘Invite’ button on the right-hand side. You will need to click on the ‘Invite’ button which will prompt an email invite notification to be sent to the user which will contain a registration link and instructions.

If at any point you wish to inactivate a user, you can do so by simply clicking on the user’s name. This action will open a window where you can find a checkbox titled ‘Inactive’. Check the box and click the ‘Save’ button.