



DELEGATED ADMINISTRATOR NEW LENDER SET UP LENDER TRAINING INFORMATION

Please complete and return to Sales@WHEDA.COM
 PLEASE NOTE: New lenders are not allowed to originate any WHEDA business until they have completed all training - There are no exceptions. ALL training is scheduled by WHEDA's Sales team through the Delegated Administrator

Lender Name		Delegated Administrator	
Parent Company		DA Phone/Email	

PLEASE LIST ALL BRANCH LOCATIONS		
LOCATION – FULL ADDRESS	MANAGER / MAIN CONTACT NAME	CONTACT INFORMATION

NEW WHEDA LENDER TRAINING AND THE ON-BOARDING PROCESS	
STEP 1	Complete and return this form to Sales@WHEDA.com - WHEDA Sales will contact the Delegated Administrator to assist with questions and schedule necessary webinars. Delegated Administrator will be given WHEDA-Connect login information
STEP 2	Delegated Administrator completes WHEDA-Connect training and set-up – Lender directed
STEP 3	Operations staff training (three) completed via webinar
STEP 3a	Delegated Authority Underwriter training - CORRESPONDENT DELIVERY CHANNEL ONLY / FHA Sponsored Origination Training - Broker/Mini-Corr Channels
STEP 4	Originator training – IN PERSON WHEN ALLOWED (<i>once all Lender Operations staff has completed training</i>)
STEP 5	Lender can begin to originate WHEDA loans

What channel or channels will be used? **Broker** **Mini Correspondent** **Correspondent**

WHEDA-Connect has four user types you must choose from to set up all your WHEDA-Connect users:

• Loan Officer	• Processor	• Post Closer	• Secondary
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Important things to consider if applicable based on Delivery channel:

- Are loan registration and rate lock management centralized -one email for all (Secondary)? Or handled by individuals? (Loan Officers, Processors)?
- What permissions will your Loan Officers or Processors need? Register loans? Lock loans? Upload documents? View only their pipeline?
- Do you want to designate one specific User Type for Managers only? Give them all permissions in WHEDA-Connect?
- Do you want certain functions handled by a department with one centralized email for all staff? (Secondary or Post Closers)?

Use the chart below to determine how your organizations business model will fit into the 4 “User Types” in WHEDA-Connect:

TASK	USER	<input type="checkbox"/> Loan Officer	<input type="checkbox"/> Processor	<input type="checkbox"/> Post Closer	<input type="checkbox"/> Secondary	<input type="checkbox"/> Centralized (one email)
Loan registration		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate locks		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Re-disclosures		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upload Application packages		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Receives UW decision notice		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clears UW conditions		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upload Funding requests		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upload Closing packages		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Handles post-close issues		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Handle deficiencies/trailing docs		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Name _____ Title _____ Date _____

MUST save document as an un-editable pdf to submit to Sales@WHEDA.com
 Click "Save as PDF" button - Choose "Microsoft print to pdf" as your printer - Click "Print"