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PHFA PIPELINE PLUS AND PENNVEST VIRPACK

FOR PENNVEST HOMEOWNER SEPTIC LOAN PARTICIPANTS

Training Overview

- Accessing the Pipeline Plus System
- What is an Account Administrator?
- Pipeline Plus Home Screen
- Pipeline Plus “Menu Item: Pennvest Virpack”

- Pennvest Virpack
- Pennvest Virpack – Submission of the Loan Origination Package
- Pennvest Virpack – Submission of Additional Documents
- Pennvest Virpack – Submission of the Closing Package
- Pennvest Virpack – Searching for a Loan

- Pipeline Plus Hints

- Contact Info

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Accessing the Pipeline Plus System

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File Edit View Favorites Tools Help
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Home
News
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Portal
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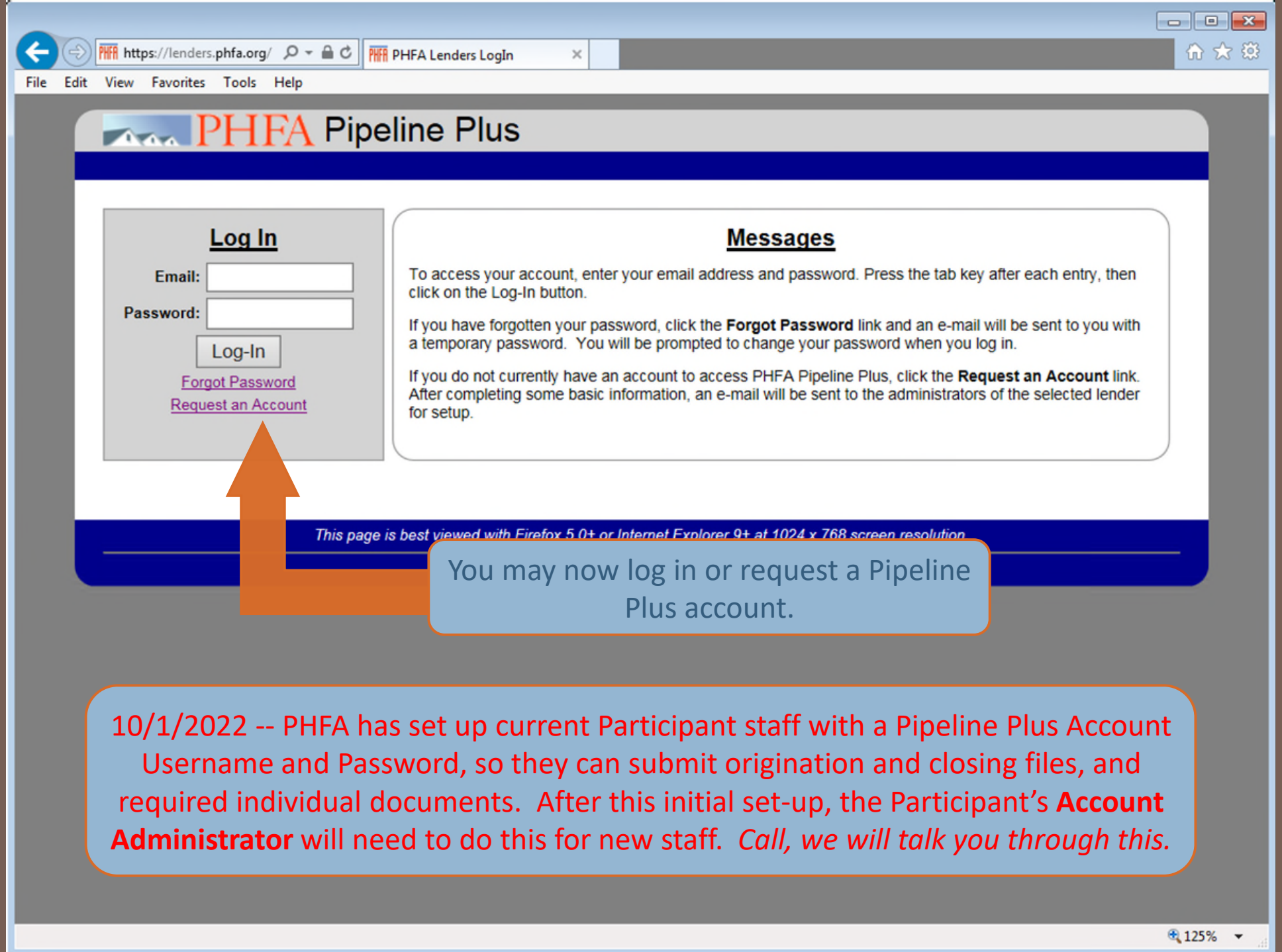
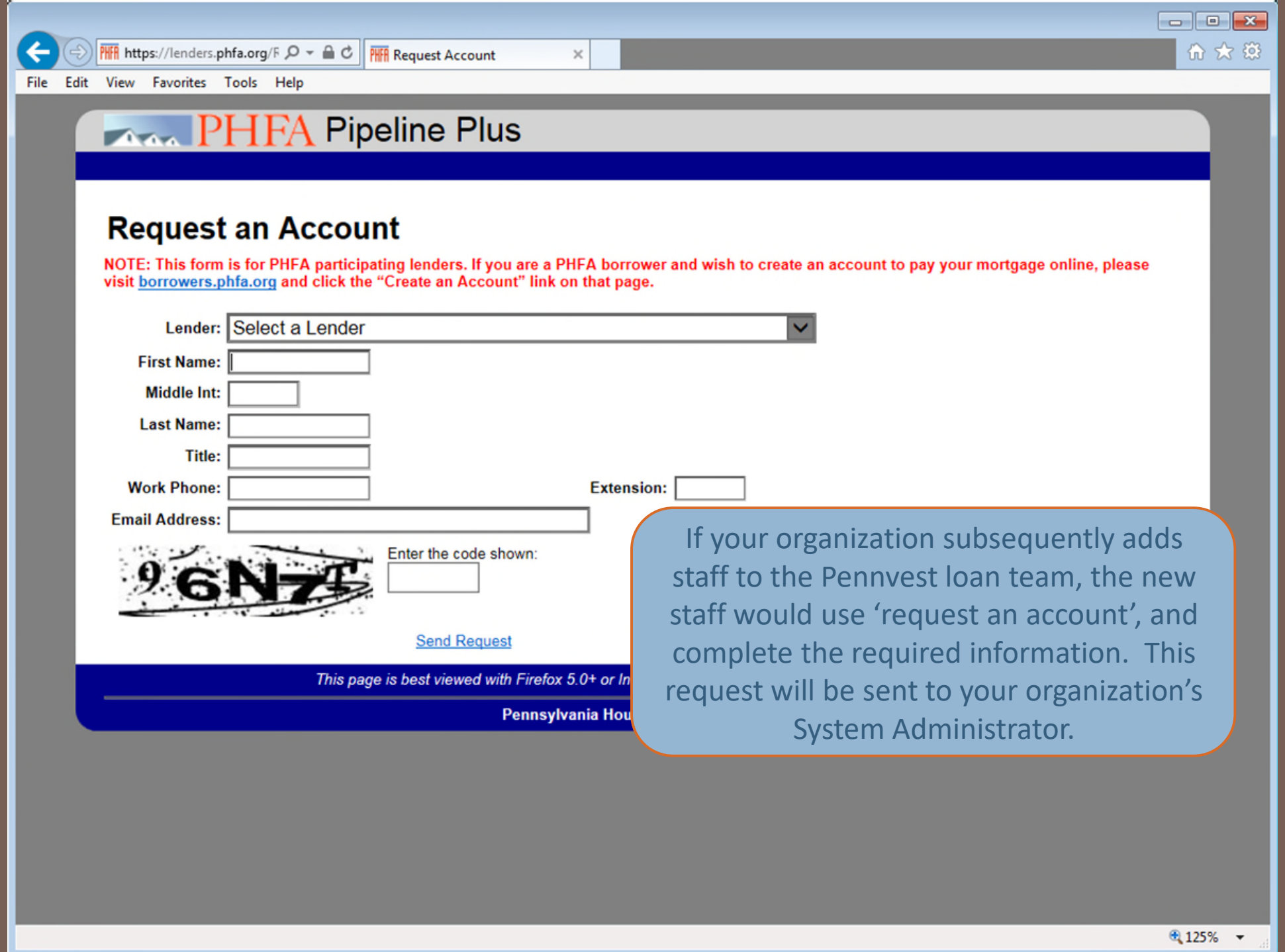
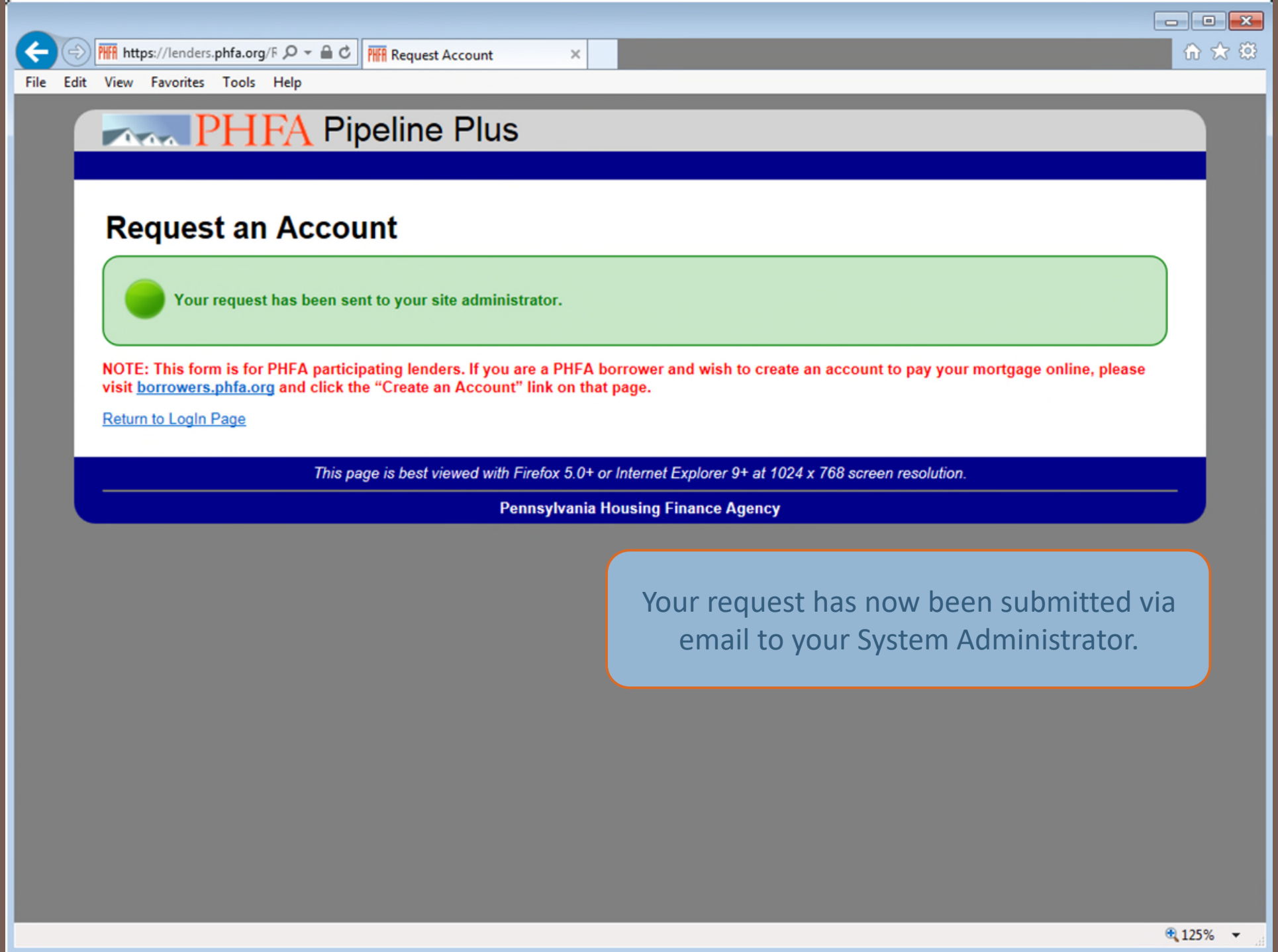
Homeownership Professionals
Pipeline Plus Login
Multifamily Housing Prof als
Multifamily Login
Counselor's Corner
mation
Homebuyers
Homeowners
Renters
Loan Program
OSC Login
Welcome to our website! Access the Pipeline by clicking 'Partners', then 'Pipeline Plus Login'. If you do not have a Pipeline Plus Account, one can be requested. See how.
A is not as ated with online bill
pay ortgage payments online.
e. Take our brief survey.
Topic Finder
Save your stamps and submit your mortgage payment at our Online Servicing Center. For quicker access skip www.phfa.org and bookmark this link...
You can also bookmark lenders.phfa.org
FIND IT
https://lenders.phfa.org/
100%

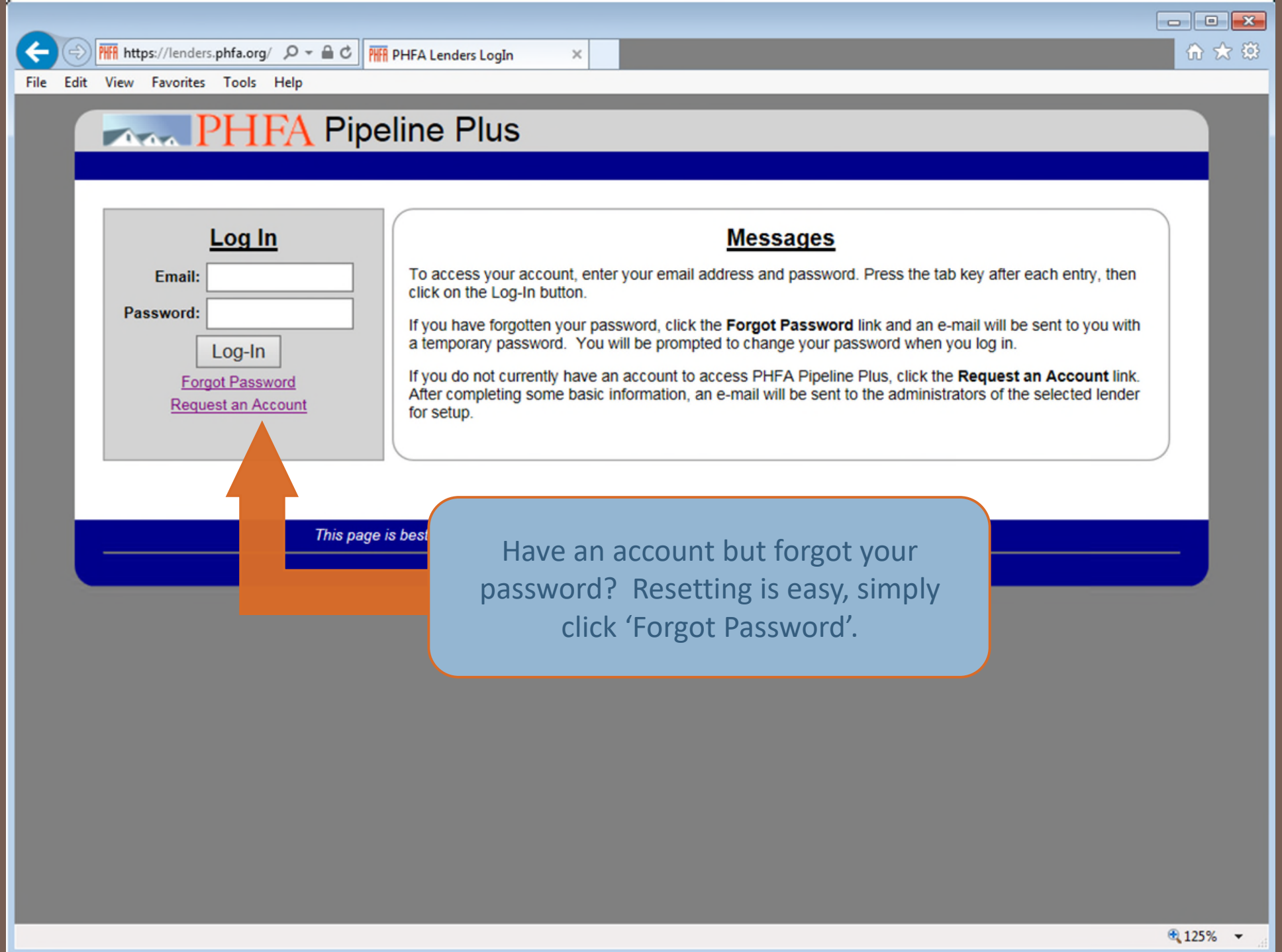

https://lenders.phfa.org/
PHFA Lenders LogIn
File Edit View Favorites Tools Help
PHFA Pipeline Plus
Log In
Email:
Password:
Log-In
Forgot Password
Request an Account
Messages
To access your account, enter your email address and password. Press the tab key after each entry, then click on the Log-In button.
If you have forgotten your password, click the Forgot Password link and an e-mail will be sent to you with a temporary password. You will be prompted to change your password when you log in.
If you do not currently have an account to access PHFA Pipeline Plus, click the Request an Account link. After completing some basic information, an e-mail will be sent to the administrators of the selected lender for setup.
This page is best viewed with Firefox 5.0+ or Internet Explorer 9+ at 1024 x 768 screen resolution
You may now log in or request a Pipeline Plus account.
10/1/2022 -- PHFA has set up current Participant staff with a Pipeline Plus Account Username and Password, so they can submit origination and closing files, and required individual documents. After this initial set-up, the Participant's Account Administrator will need to do this for new staff. Call, we will talk you through this.
125%



If your organization subsequently adds staff to the Pennvest loan team, the new staff would use 'request an account', and complete the required information. This request will be sent to your organization's System Administrator.



Your request has now been submitted via email to your System Administrator.


https://lenders.phfa.org/
PHFA Lenders LogIn
File Edit View Favorites Tools Help
PHFA Pipeline Plus
Log In
Email:
Password:
Log-In
Forgot Password
Request an Account
Messages
To access your account, enter your email address and password. Press the tab key after each entry, then click on the Log-In button.
If you have forgotten your password, click the Forgot Password link and an e-mail will be sent to you with a temporary password. You will be prompted to change your password when you log in.
If you do not currently have an account to access PHFA Pipeline Plus, click the Request an Account link. After completing some basic information, an e-mail will be sent to the administrators of the selected lender for setup.
This page is best
Have an account but forgot your password? Resetting is easy, simply click 'Forgot Password'.
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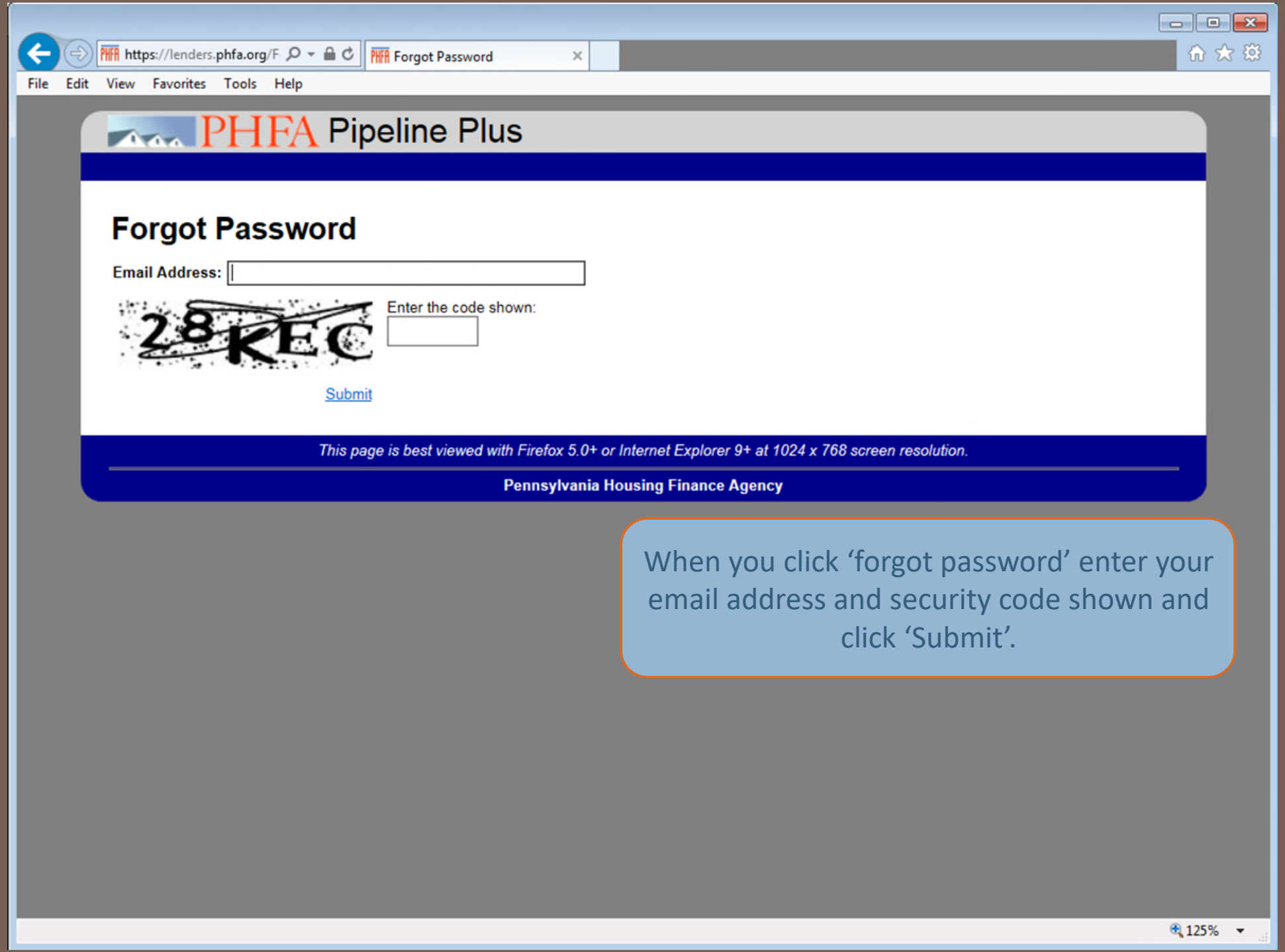
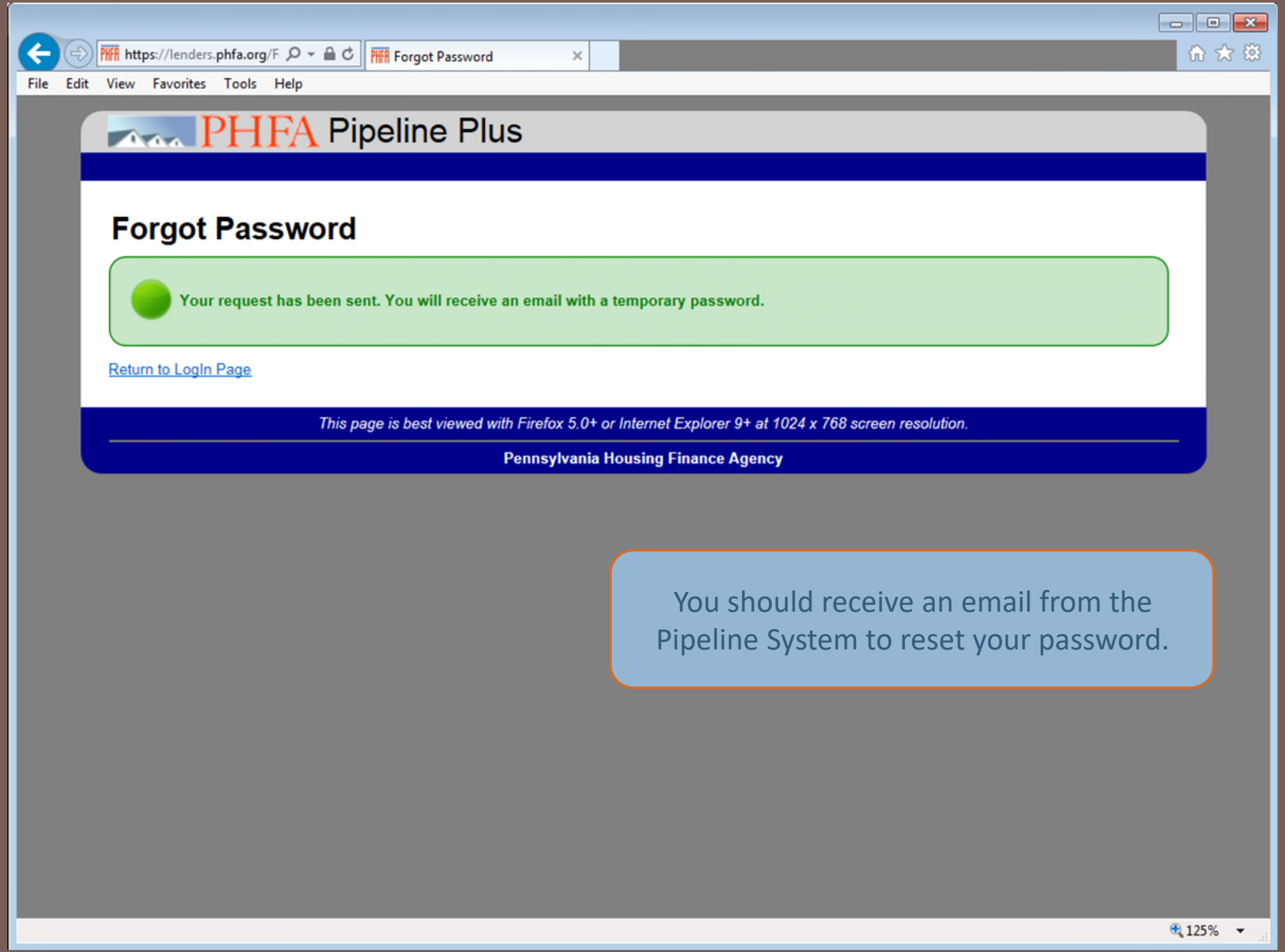


When you click ‘forgot password’ enter your email address and security code shown and click ‘Submit’.



You should receive an email from the Pipeline System to reset your password.

Account Administrators

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Account Administrators

- Users that are authorized to add, remove and modify the accounts within their organization
- They use the '**User Accounts Admin**' menu function to perform these tasks.
- Contact your Account Administrator to make sure you have Pennvest Virpack menu item so you can submit documents, after PHFA's initial set up of your Pipeline Plus account.
- If you process files, you should also have an ID to view documents and files in Virpack. Your Administrator initiates this request by email to PHFA. PHFA sets this permission up.

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Pipeline Plus Home Screen

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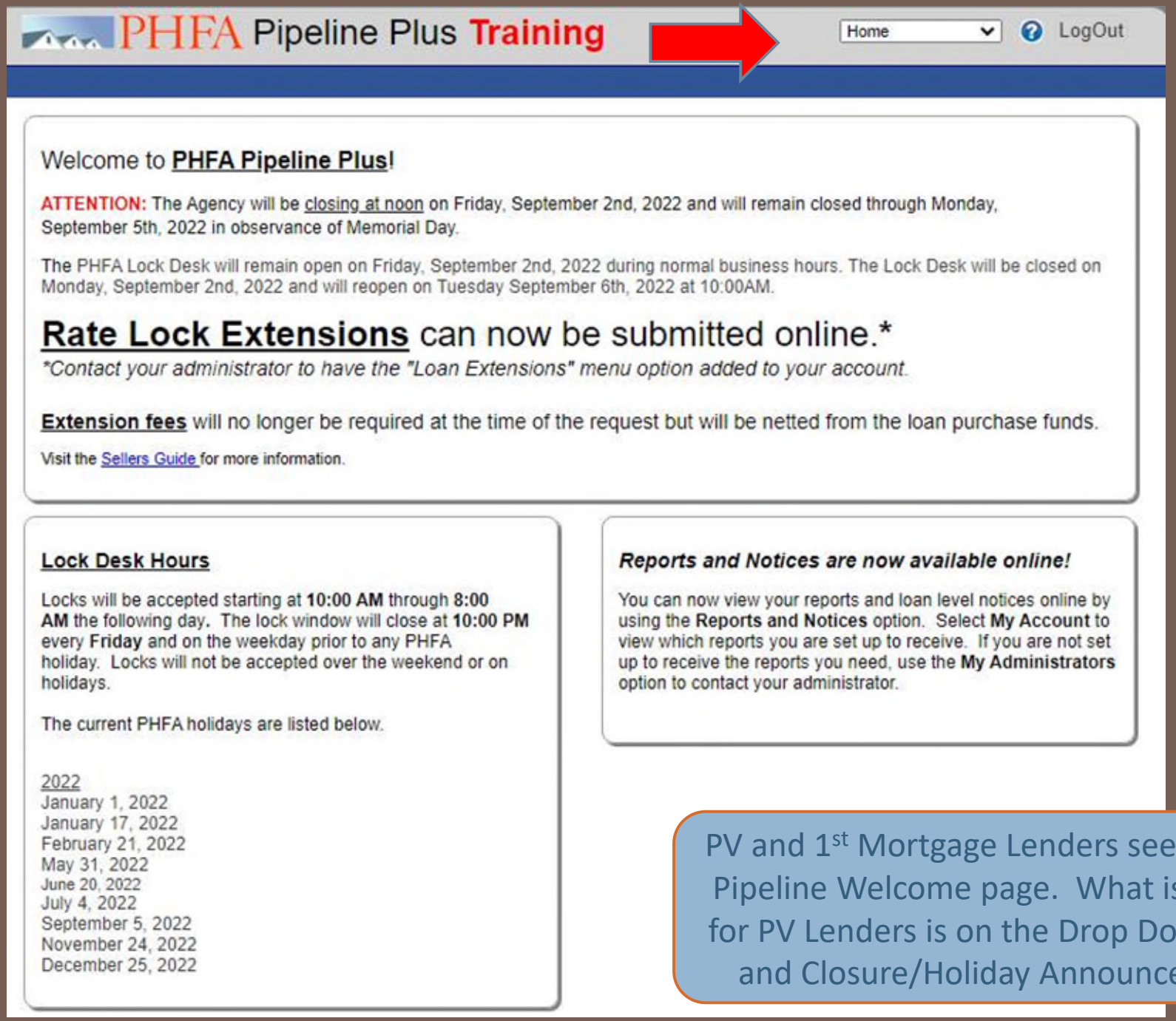

PV and 1st Mortgage Lenders see the same Pipeline Welcome page. What is relevant for PV Lenders is on the Drop Down Menu and Closure/Holiday Announcements.

Pipeline Plus Menu Items

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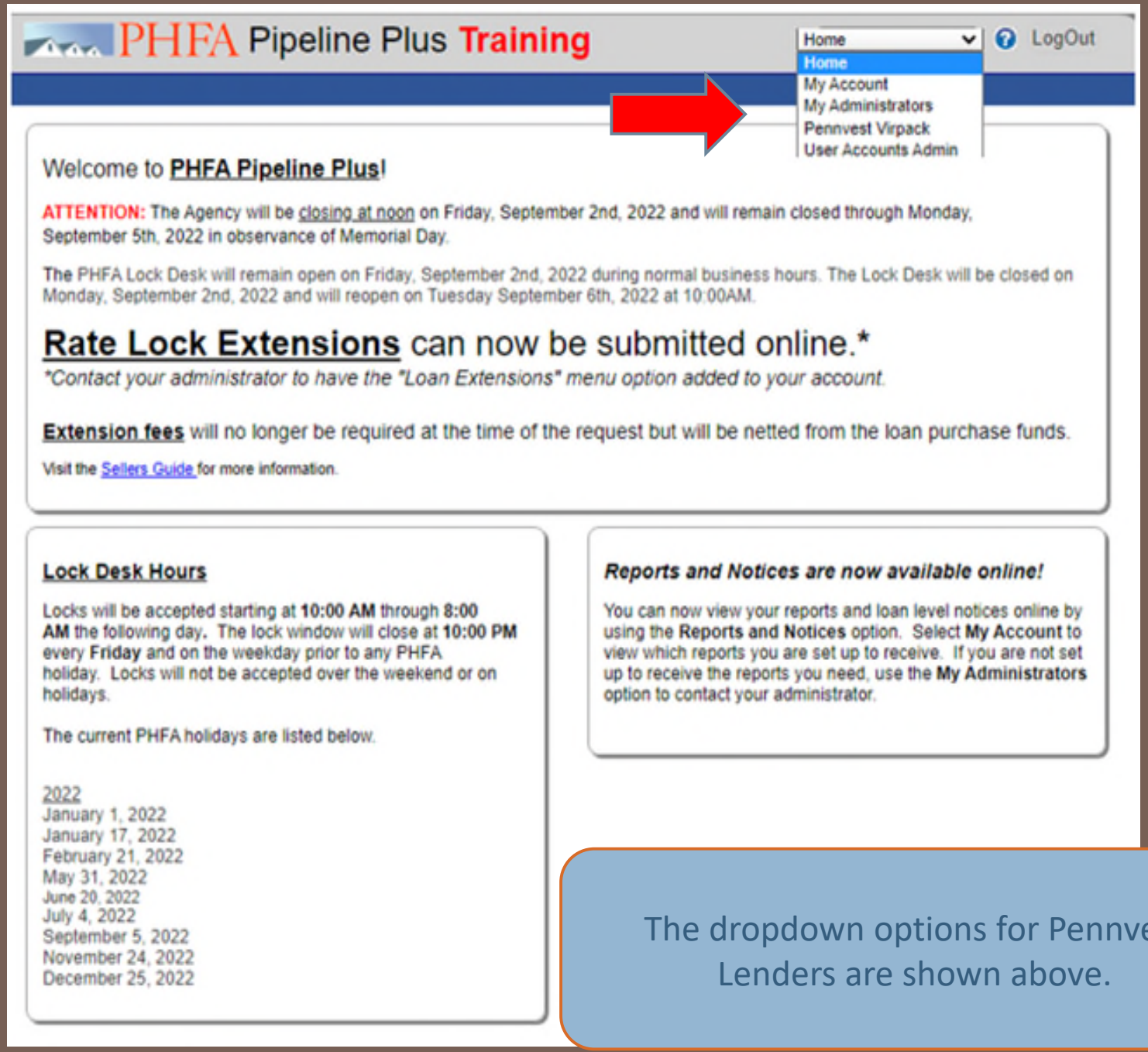
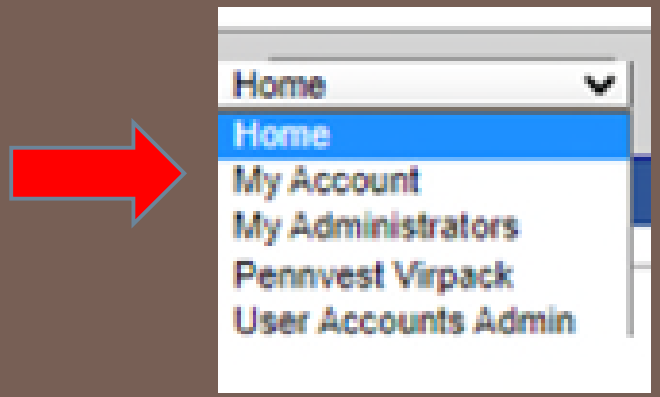


The dropdown options for Pennvest Lenders are shown above.

Pipeline Plus – My Account

- Where individual users can modify their Contact info.



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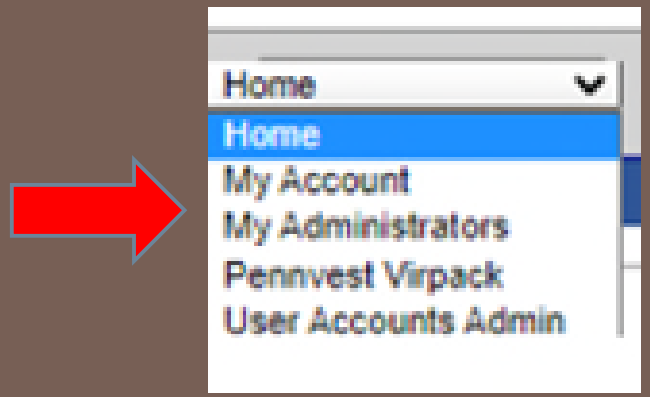
Pipeline Plus – My Administrators



- This item provides a list of your organization's Account Administrators, along with contact information.

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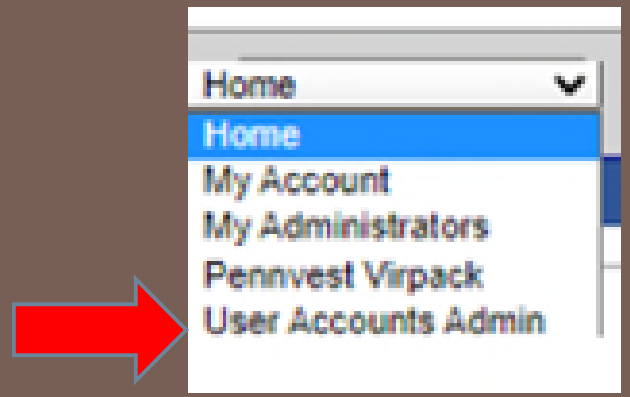
Pipeline Plus – User Accounts Admin



- See Account Administrators slide
- This is where they access their “administrative” functions

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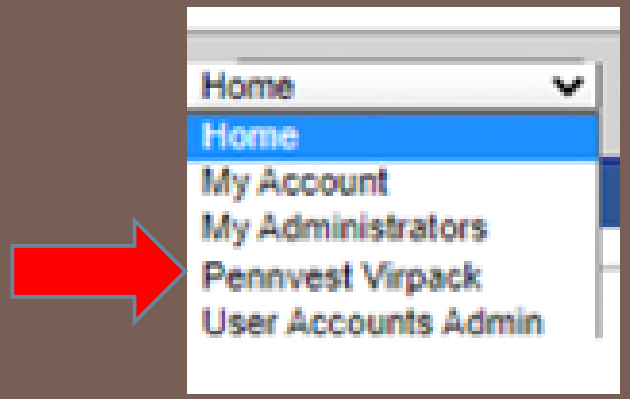
Pipeline Plus – Pennvest VirPack



- Pennvest Virpack Menu Option – this allows you to submit loan files and documents to the Virpack storage program.
- Pennvest VirPack ID and Authorization
  - This ID allows you to view previously submitted packages and documents, seeing PHFA work on file/doc.
  - Administrators must request Pennvest VirPack IDs for each user by emailing lenders@phfa.org PHFA configures this ID.

Account Administrators: please request ID for all processing staff!

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Pennvest Virpack – Submission of the Origination Package

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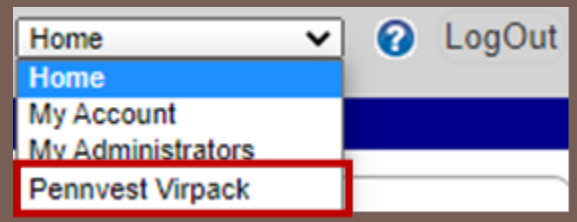
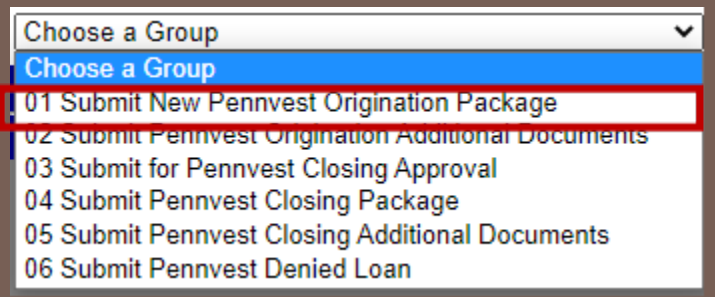
Pennvest VirPack- Submission of the Orig Pkg

- As long as you have a Pipeline Plus account and access to the Pennvest Virpack menu, you can submit documents.
- To submit a new loan package in the Pennvest Virpack menu:
  - Log into Pipeline Plus and Select the Pennvest VirPack menu option.



  - Select ‘Submit New Pennvest Origination Package’ from the Group dropdown to submit a new Origination package.



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Pennvest VirPack- Submission of the Orig Pkg

- Select 'Browse' to find your saved documents on your computer then select 'Upload.' Continue the steps until all the documents have been submitted.

- Your file name will be the file name that is uploaded. Please use "LastNameFI_document." [*Ex:* FlynnM_creditapp] Make sure the documents are saved as PDFs, not passworded or locked, and the names do not have special characters or spaces. Also our maximum length is 74 characters.

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Pennvest VirPack- Submission of the Orig Pkg

- Notice that you don't select a loan file number or name when you upload the Origination Package. Your document name is the document name. [LastnameFI_document]
- PHFA generates the loan number.
- You will select the borrowers' folder by name and loan number when you submit subsequent documents and packages.

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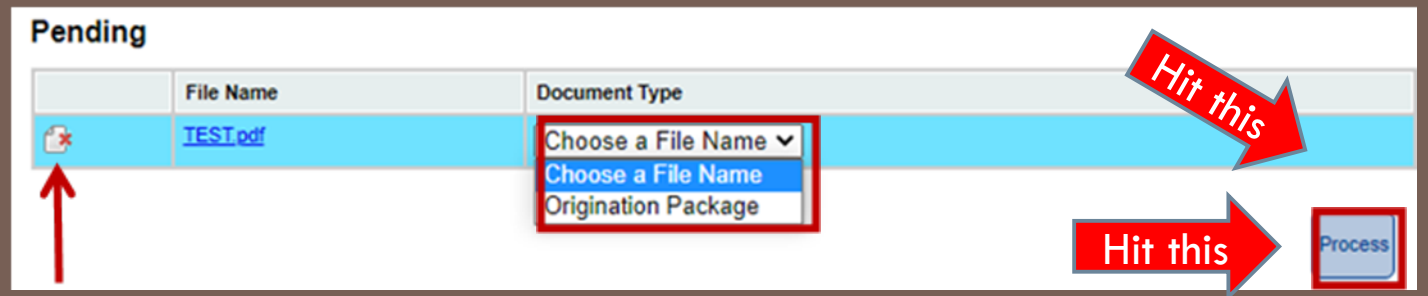
Pennvest VirPack- Submission of the Orig Pkg

- Select 'Origination Package' Document Type for the submitted file.



  - If you submit a document by mistake you can remove it by selecting the 'Delete Document' icon.
  - If you submit a document but do not select 'Process' within 24 hours of the upload the document will be automatically deleted and must be re-submitted.

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Pennvest VirPack- Submission of the Orig Pkg

- To verify that the file has successfully uploaded look for PROCESSED and file information.

Processed

Document Type	Group	File Name	File Uploaded	Uploaded By	File Processed	Processed By	Sent to VirPack
Origination Package	Submit New Pennvest Origination Package	TEST.pdf	6/24/2022 8:42 AM	Test Test	6/24/2022 8:43 AM	Test Test	6/24/2022 8:43 AM

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Pennvest Virpack – Submission of Additional Documents

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Pennvest VirPack- Submission of Additional Docs

- As a loan moves through the phases toward closing, these steps are repeated for each file or document you need to Upload:
  - Submit Pennvest Origination Additional Documents
  - Submit Pennvest Closing Approval – this is the DRAFT Closing Disclosure submission
  - Submit Pennvest Closing Package
  - Submit Pennvest Closing Additional Documents
  - Submit Pennvest Denied Loan
- See PHFA website for Pennvest Lenders to get step-by-step instructions in "Pipeline Plus-Virpack Instructions."

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Pennvest Virpack – Submission of Additional Documents

- For each upload you do for a loan moving from Origination -- to Construction Approval/Approval to Close -- to Closed -- you will select the loan phase, then select a particular loan file by Loan # and Last Name within that phase, and then click on "Documents" to add more documents to that borrower's file.

- Uploading a Denied file may be like uploading an Origination Package. It may be a "first submission" to PHFA so then there isn't an existing Loan # and Last Name.

Pennvest Virpack – Submission of the Closing Package

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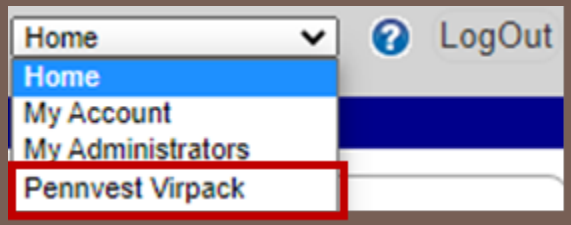
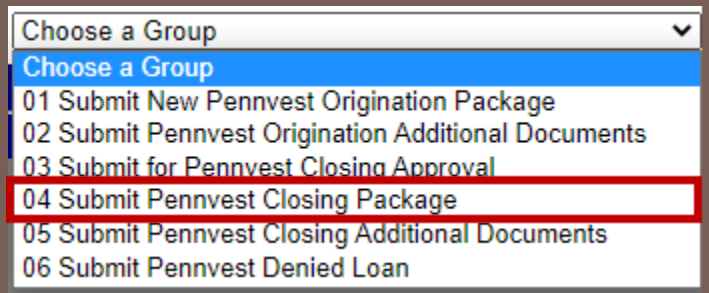
Pennvest Virpack – Submission of a Closing Pkg

- As always, start by Selecting the 'Pennvest Virpack' menue option from the Pipeline Plus dropdown.

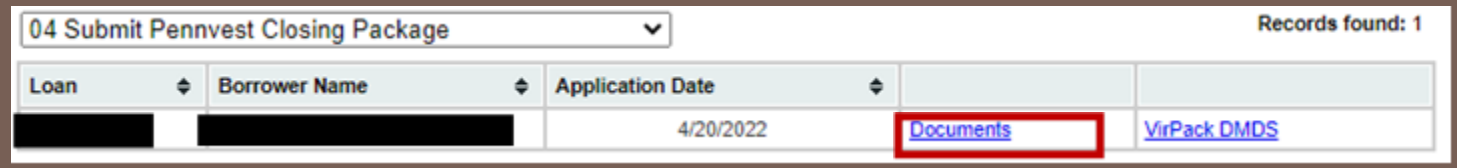


- Select 'Submit Pennvest Closing Package' from the Group dropdown



Pennvest Virpack – Submission of a Closing Pkg

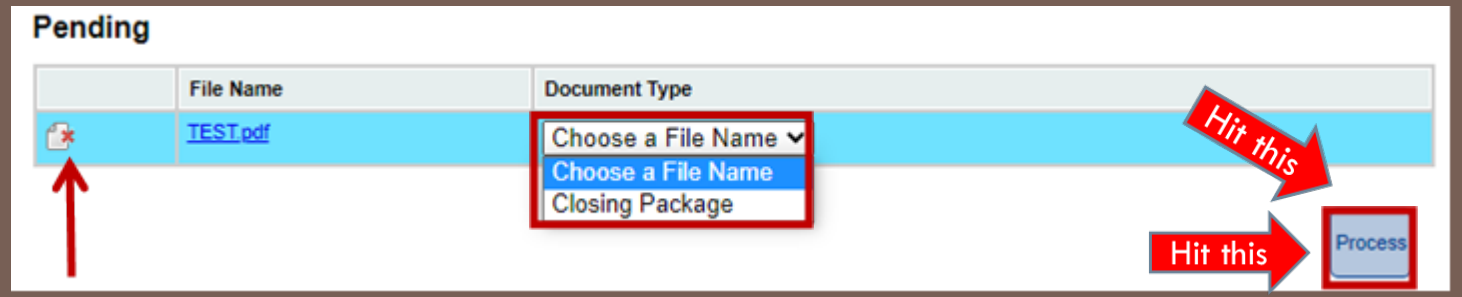
- A list of available loans will display. Select the 'Documents' link to begin submission of the required documentation.



- Select 'Browse' to find your saved documents on your computer and then 'Upload'. Continue until all documents are uploaded.

Pennvest Virpack – Submission of a Closing Pkg

- Select the 'Closing Package' Document Type for the uploaded file



- If you submit a document by mistake you can remove it by selecting the 'Delete Document' icon
- If you submit a document but do not select 'Process' within 24 hours of the upload the document will be automatically deleted and must be re-submitted.

Pennvest Virpack – Submission of a Closing Pkg

- To verify that the file has successfully uploaded look for PROCESSED and file information.

Processed

Document Type	Group	File Name	File Uploaded	Uploaded By	File Processed	Processed By	Sent to VirPack
Closing Disclosure	Submit for Pennvest Closing Approval	TEST.pdf	6/24/2022 8:52 AM	Test Test	6/24/2022 8:52 AM	Test Test	6/24/2022 8:52 AM

Pennvest Virpack – Searching for a Loan

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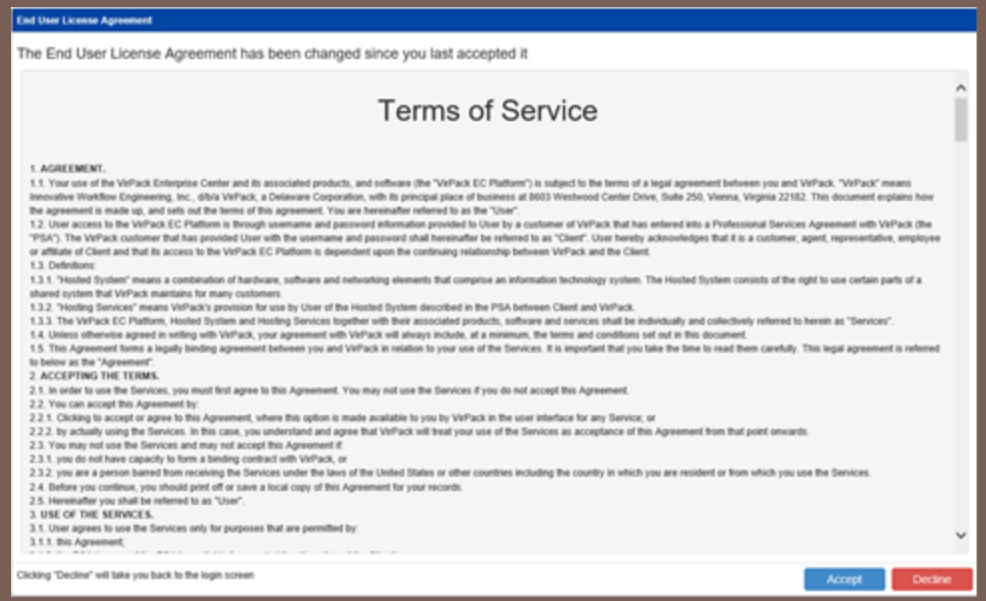
Pennvest VirPack- Searching for a Loan

- PLEASE NOTE The first time you view a loan within Pennvest Virpack, you will be prompted to accept an 'End User License Agreement.' You must do so.



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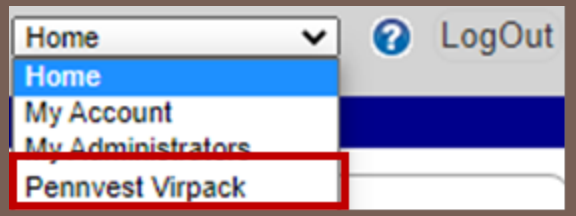
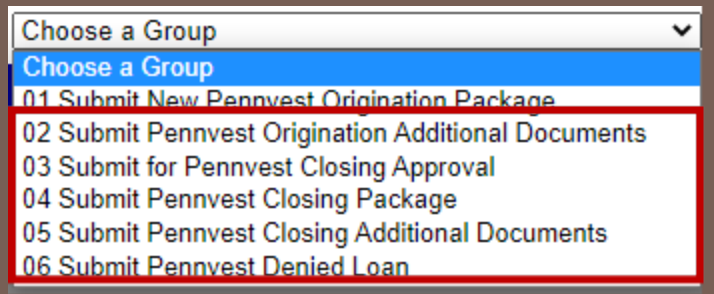
Pennvest VirPack- Searching for a Loan

- Select ‘Pennvest Virpack’ from the Pipeline Plus Home Dropdown



- Select the appropriate submission group from the dropdown. Where is the loan in the process? That is its “status” and the dropdown category you pick.



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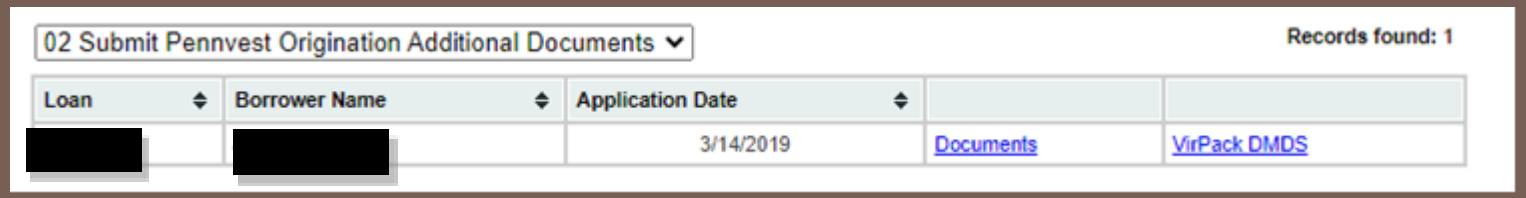
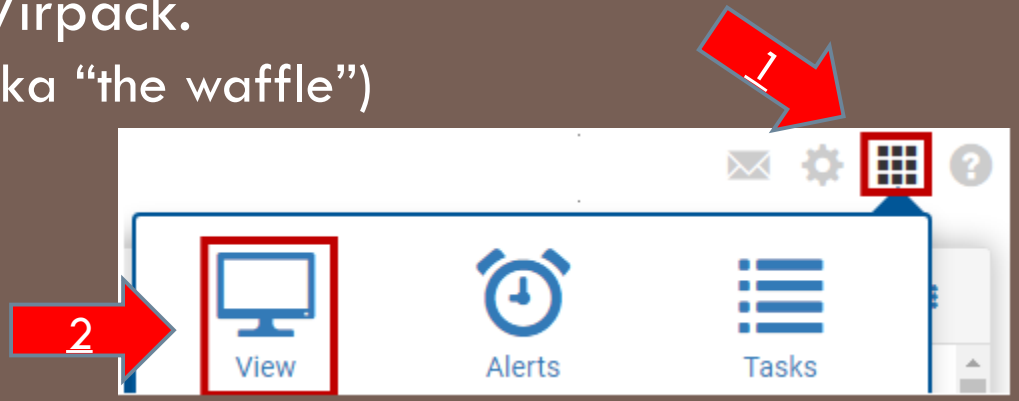
Pennvest VirPack- Searching for a Loan

- A list of the Participant's loans in that status will appear. Select the 'VirPack DMDS' link for the loan you want to view.



- If you do not see the particular loan you wanted, select any 'Virpack DMDS' link and use the Search by Loan Option within Virpack.
  - Select 'Application Menu' (the 3x3 square, aka "the waffle") and then View



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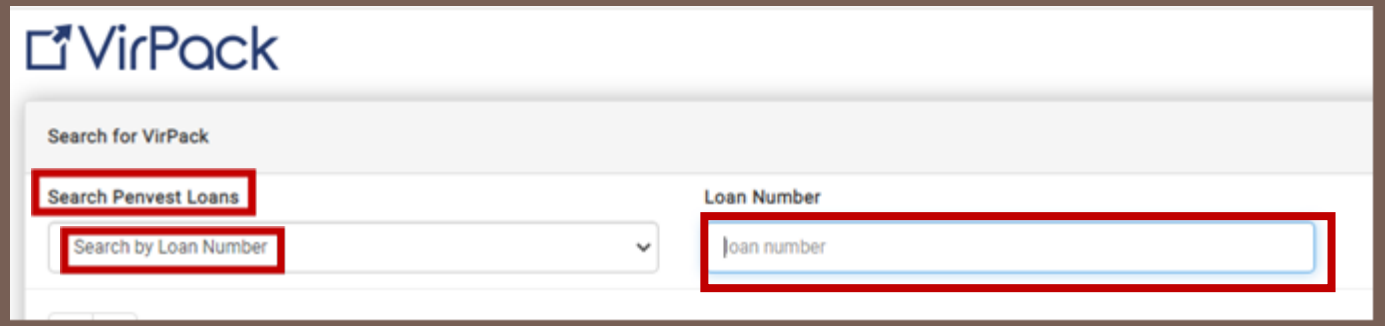
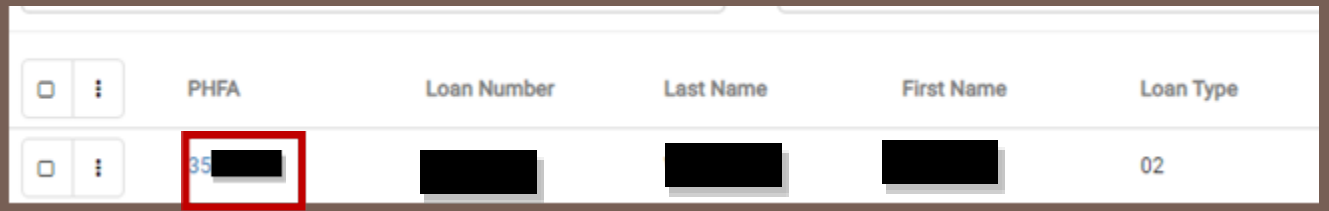
Pennvest VirPack- Searching for a Loan

- Verify that you are searching Pennvest Loans and enter the PHFA Loan Number. Then select 'Filter' or press your ENTER key to search.



- Select the blue loan number hyperlink



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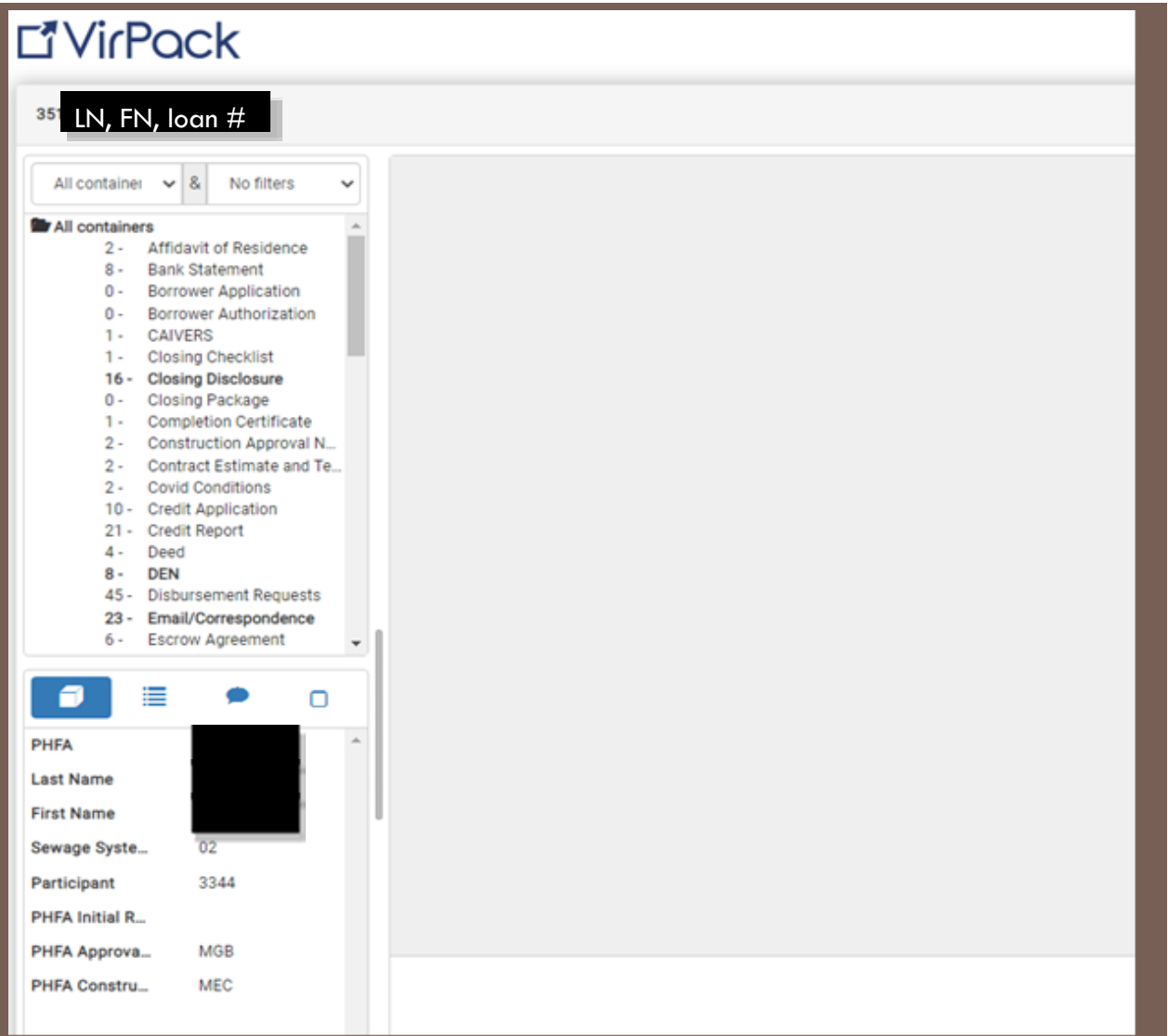
Pennvest VirPack- Searching for a Loan

- Once you have opened the loan folder, submitted documents will be in their initial container if PHFA staff have not begun working on them.

OR you will see the documents in numerous different containers if PHFA staff have begun reviewing them.



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Pennvest Virpack Session Expiration

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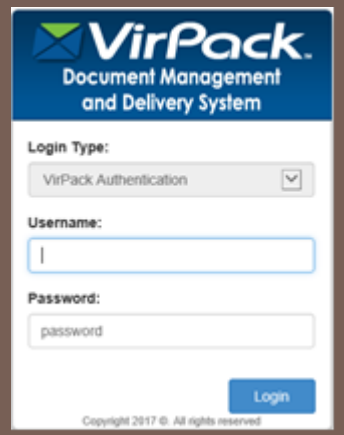
Pennvest Virpack Session Expiration

- If you have the Pennvest Virpack window open for a prolonged time period, your session will expire, and you will be prompted to login with this screen:



X

- You do not have direct login credentials so must go back to the Pipeline Plus, log in, and access the Pennvest Virpack menu item.

Pipeline Plus Hints

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Hint: Why Can't I log in?
For Users:

The number 1 question is *why can't I log in?*

Check these before calling us:

1. Are you at lenders.phfa.org OR at phfa.org and selecting "Partners' Menu" at the top and then "Pipeline Plus Login" --?

2. Is your password is no longer than 10 characters?

3. Your username matches the email address your onsite Administrator used to set up your Account? Ask them!

4. If none of the above help, then try a password reset by selecting "Forgot Password" link on the Login page of Pipeline Plus.

Hint: Admin Issues for Administrators:

Check these before calling us:

1. Are you trying to enter a menu to a user's account – make sure that you are trying to enter only one of the 4 menu items that Pennvest Participants are eligible for.

2. If you are a PHFA 1st Mortgage Lender, you do not need a separate account for the Pennvest program. Your onsite Administrator will have the option to add its permissions to your account.

3. If none of the above help, Please refer to VirPack Instructions for Pennvest Lenders or Appendix N – Appropriate Contact Persons.

Contact Information

- Virpack Technical Support lenders@phfa.org *specify Pennvest Loan Type in email

- Director of Homeownership
  - Coleen Baumert cbaumert@phfa.org 717.780.1871
- Special Initiatives
  - Roberta Schwalm rschwalm@phfa.org 717-780-3838
  - Marisa Shull marshull@phfa.org 717-780-4034
  - Marian Coughlin mcoughlin@phfa.org 717-780-3820

- Homeownership Professionals Line 717.780.3871

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THANK YOU FOR YOUR TIME AND ATTENTION!

9/26/22 RRS