

4. 3 Inviting a Lender Agent

This section covers how to initiate setting up a relationship with a lender agent. After you invite a lender agent to establish a relationship with your organization, the lender agent receives an email from ead-noreply@veros.com inviting them to submit the appraisal data files on your organization's behalf. To become an active lender agent for your organization, the agent must log in to the EAD portal and accept the invitation.

The lender agent can perform all of the functions of a lender user, including submitting the appraisals, viewing the results, requesting the overrides, searching for the appraisals, scheduling and viewing the reports, and viewing all the findings related to the appraisals submitted on your organization's behalf. This includes UAD Compliance Check messages, and all FHA proprietary findings that are delivered as part of the appraisal results through the EAD portal.

To invite a lender agent, follow these steps:

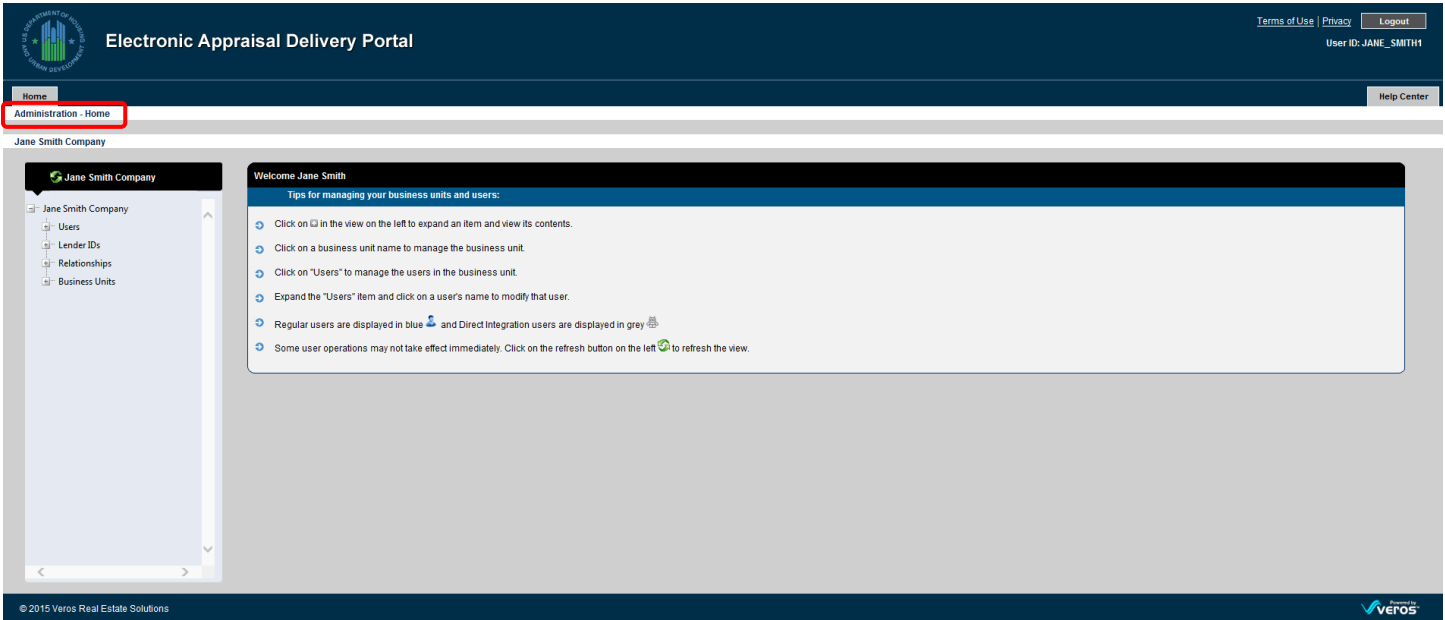
1. From the EAD portal **Home** page, click the **Account Administration** tab and select **User and Business Unit Administration**.

The screenshot shows the EAD portal interface. The 'Account Administration' dropdown menu is expanded, and 'User and Business Unit Administration' is highlighted with a red box. A red arrow points from this box to a callout box at the bottom of the page.


**User and Business
Unit Administration**

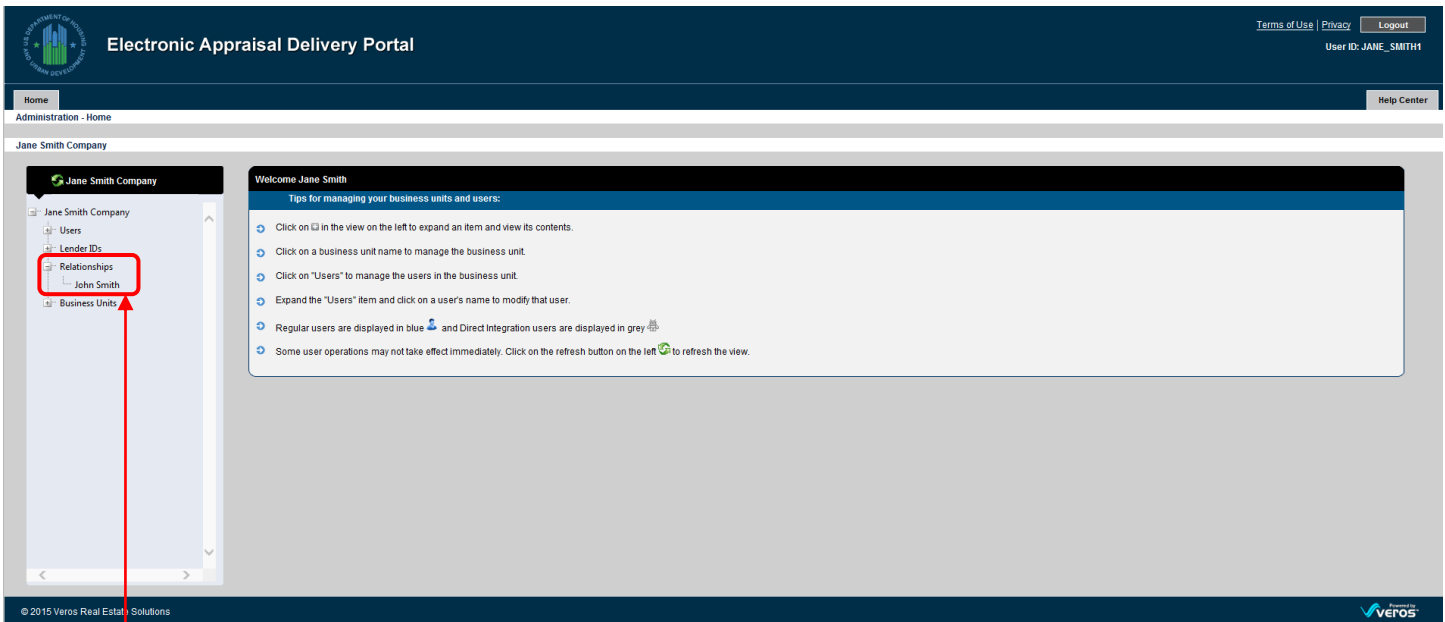


After you select **User and Business Unit Administration**, the **Administration - Home** page appears.



2. From the **Administration – Home** page, click **Relationships** in the left navigation bar.

Note: Click the  sign to display the list of lender agents associated with that business unit.

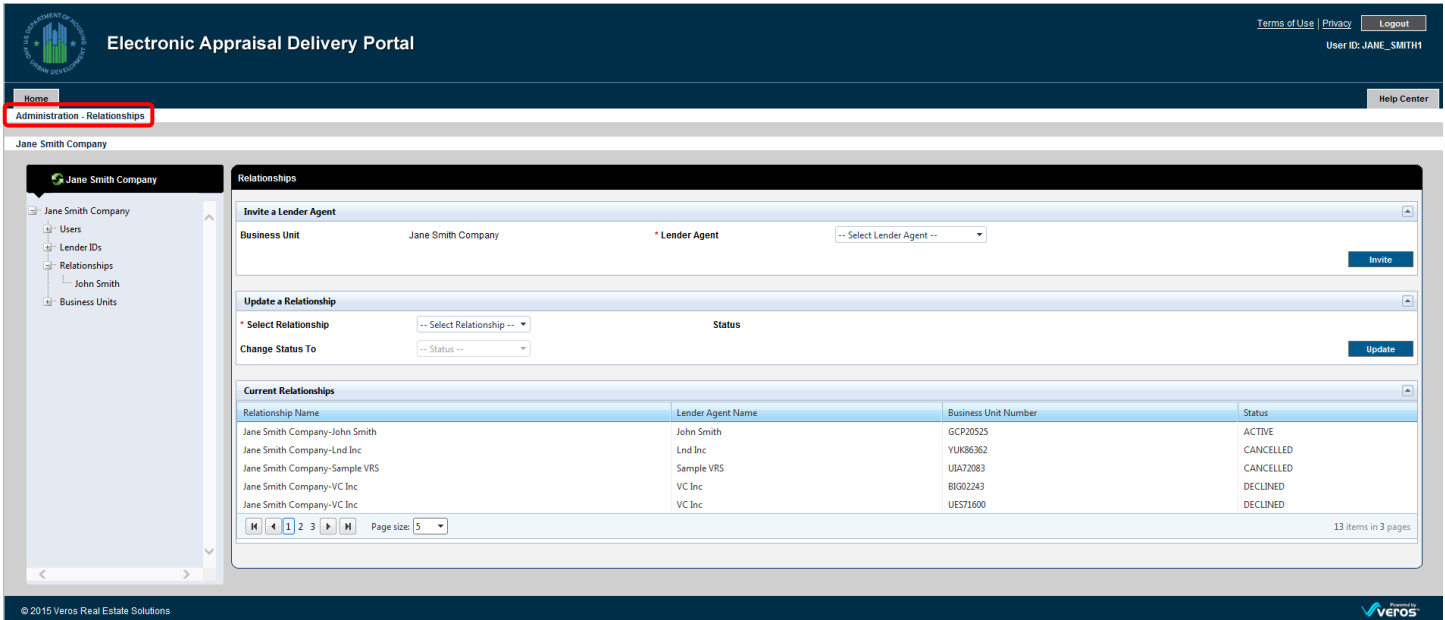


Relationships



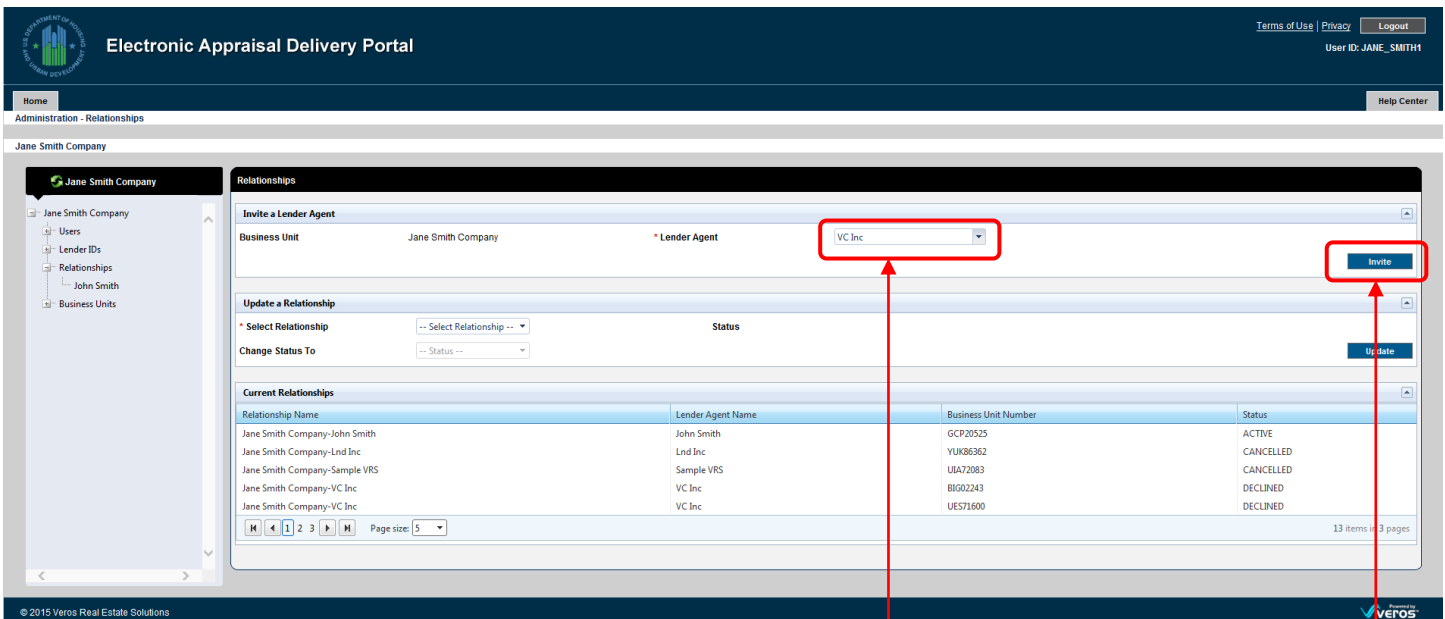


After you select **Relationships** from the left navigation bar, the **Administration - Relationships** page appears.



This page allows you to invite a lender agent to establish a relationship with your organization.

- From the **Administration - Relationships** page, select the Lender agent you wish to invite from **the Lender Agent** dropdown.



Select Lender Agent

Invite Button

Click **Invite**.





After you click **Invite**, You have successfully invited [name of the lender agent] message appears.

The **Current Relationships** section shows a “Pending” status until the lender agent accepts or declines the relationship invitation.

The screenshot shows the 'Electronic Appraisal Delivery Portal' interface for 'Jane Smith Company'. At the top, there are links for 'Terms of Use', 'Privacy', and 'Logout', along with the user ID 'JANE_SMITH1'. The main content area is titled 'Relationships' and contains three sections: 'Invite a Lender Agent', 'Update a Relationship', and 'Current Relationships'. The 'Invite a Lender Agent' section shows a message 'You have successfully invited VC Inc.' highlighted with a red box. Below it, there are fields for 'Business Unit' (Jane Smith Company) and 'Lender Agent' (VC Inc), with an 'Invite' button. The 'Update a Relationship' section has dropdowns for 'Select Relationship' and 'Change Status To', with an 'Update' button. The 'Current Relationships' section is a table with the following data:

Relationship Name	Lender Agent Name	Business Unit Number	Status
Jane Smith Company-John Smith	John Smith	GCP20525	ACTIVE
Jane Smith Company-Lnd Inc	Lnd Inc	YUK86362	CANCELLED
Jane Smith Company-Sample VRS	Sample VRS	UA72083	CANCELLED
Jane Smith Company-VC Inc	VC Inc	HMB24056	PENDING
Jane Smith Company-VC Inc	VC Inc	BIG02243	PENDING

The 'PENDING' status in the table is highlighted with a red box. A red arrow points from the 'Successful Message' label below to the invitation message, and another red arrow points from the 'Pending Status' label below to the 'PENDING' status in the table.

Successful Message

Pending Status

The lender agent then receives an email invitation. If the lender agent accepts the invitation, the EAD portal creates the relationship between your organization and the lender agent. The status in the Current Relationships section changes to “Active”.

Note: If the lender agent has not yet accepted the invitation, you can cancel the request by updating the lender agent's status to “Inactive”. Refer to 4.4 Updating a Lender Agent Relationship.

