Best Practices

Lender Portal Best Practices for Lenders Delivering Both Correspondent and HFA Loans July 24, 2026

☒ Correspondent

☒ Housing Finance Agency (HFA)

Summary

U.S. Bank provides best practices and helpful hints to assist lenders in using Lender Portal including successful loan registration, delivery, review/underwriting, and loan funding. The best practices focus on Lender Portal specifically for shared lenders who deliver both Correspondent and HFA loans.

We encourage you to share this communication with the various team members in your organization who may not be on our distribution list and who also utilize Lender Portal for both Correspondent and HFA loan delivery.

Lender Portal Notifications

We've made several enhancements to the Lender Portal to provide greater visibility and flexibility in managing notifications.

New: Closing Package Delivered Notification

Users can now opt in to receive a notification when a closing package has been successfully delivered to U.S. Bank. To enable this notification, navigate to User Setup within the Lender Portal and, under Closing Package Delivered select desired preference.

New: Channel-Specific Notification Preferences

For lenders who conduct business in both the Correspondent and HFA channels, users can now manage notification preferences by channel.

By default, users associated with both channels will receive notifications for both Correspondent and HFA activity. Users may update their preferences at any time through the Lender Portal, User Management screen by deselecting the channel(s) for which they no longer wish to receive notifications.

Enhanced User Report

The User Report has also been enhanced and now includes each user's notification preferences, providing greater visibility into notification settings across your organization.

These enhancements are designed to help you manage Lender Portal notifications better and improve your overall user experience.

Questions

Correspondent: Please contact your Account Executive or the Client Support Area at 800.200.5881, option 1.

HFA: Please contact the Housing Finance Agency Hotline at 800.562.5165, option 2 for the HFA Client Support Team.