Best Practices

Lender Portal Conditions Enhancement

August 21,2026

☒ 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 enhancements to the Lender Portal to include two new date fields; Initial Condition Date and Date Modified. These fields will make it easier to identify the date a condition was first created and the most recent date the condition was updated.

New Condition Date Fields

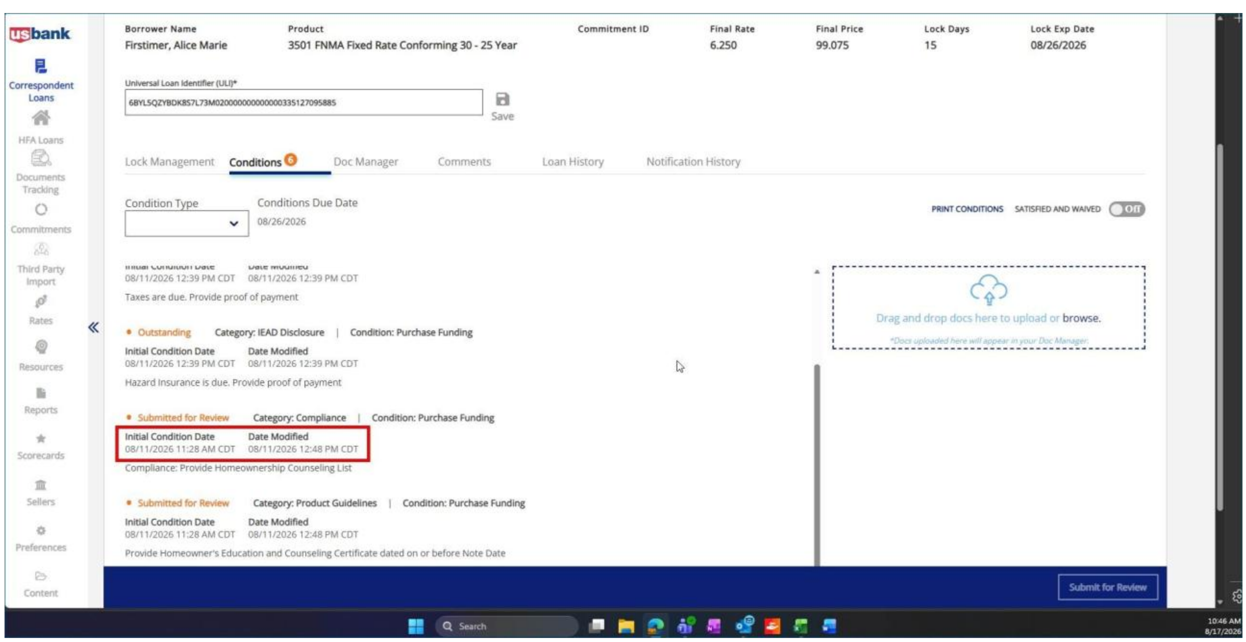
- Initial Condition Date, including time stamp - The date the condition was first created.
- Date Modified, including time stamp - The most recent date the condition was updated.

How the Dates Will Display

During the initial review, the Date Modified field will match the Initial Condition Date. If the condition is updated after the initial review, the Date Modified field will reflect the latest update date.

Where the Fields Will Appear

The new fields will be visible when viewing Conditions from both the Pipeline and Loan Details screens in Lender Portal.



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.