

# Department of Veterans Affairs

## Lender/Service Administration

### User Instructions



March 2015

Version 2.5

## Revision History

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<b>Date</b>	<b>Version</b>	<b>Description</b>	<b>Author</b>
2/27/2013	1.0	Initial Version	S. Bard
5/15/2013	2.0	Appoint/Remove Other Admins update	P. Petry
6/2/2013	2.1	Added Export to Excel	P. Petry
12/23/14	2.2	Condensed and added clarifications	D. Bishop
2/4/15	2.3	Corrected grammar	D. Bishop
3/4/15	2.4	Content Cleanup and Rename	D. Bishop
3/18/15	2.5	Address comments	D. Bishop

# Artifact Rationale

A User Guide is a technical communication document intended to give assistance to people using a particular system. It is usually written by a technical writer, although it can also be written by programmers, product or project managers, or other technical staff. Most user guides contain both a written guide and the associated images. In the case of computer applications, it is usual to include screenshots of the human-machine interface(s), and hardware manuals often include clear, simplified diagrams. The language used is matched to the intended audience, with jargon kept to a minimum or explained thoroughly. The User Guide is a mandatory, increment-level document, and should be updated to reflect the contents of the most recently deployed increment.

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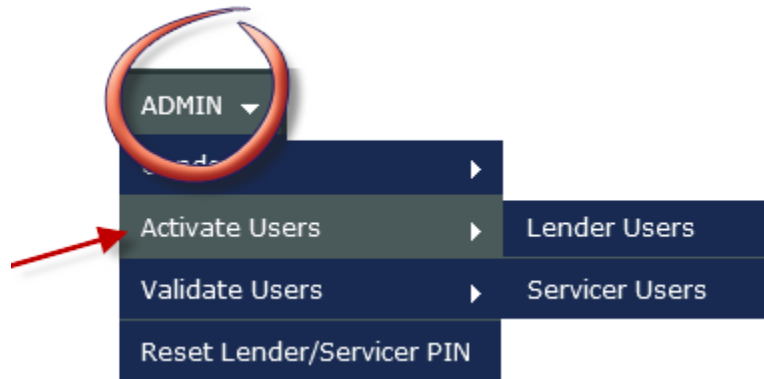
# 1. Guide to Lender/Service Administrative User Functions

**Note:** Each of these items are independent of each other. Reference the section that pertains to your specific need.

## 1.1. Activating New or Inactive Users

**Note:** If no users are displayed; there are either no pending users that require *Activation*, or another Admin already performed the necessary actions.

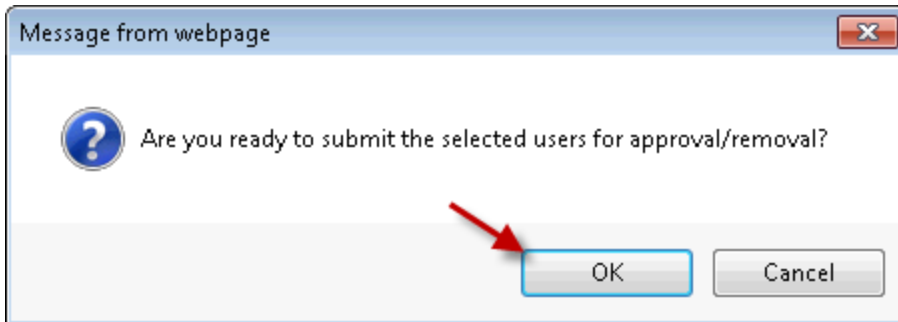
1. Open the WebLGY application.
2. From the top navigation bar, click **Admin > Activate Users > Lender/Service Users**.



3. In the list view, select **Approve** to activate the user account or **Remove** to disallow activation.



4. Click **Submit**.
5. In the pop-up window, click **OK** to confirm your action.

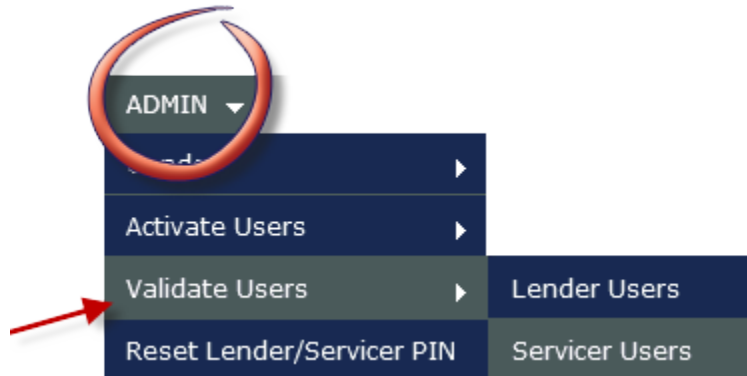


6. The screen will refresh and users selected will no longer appear in the window.

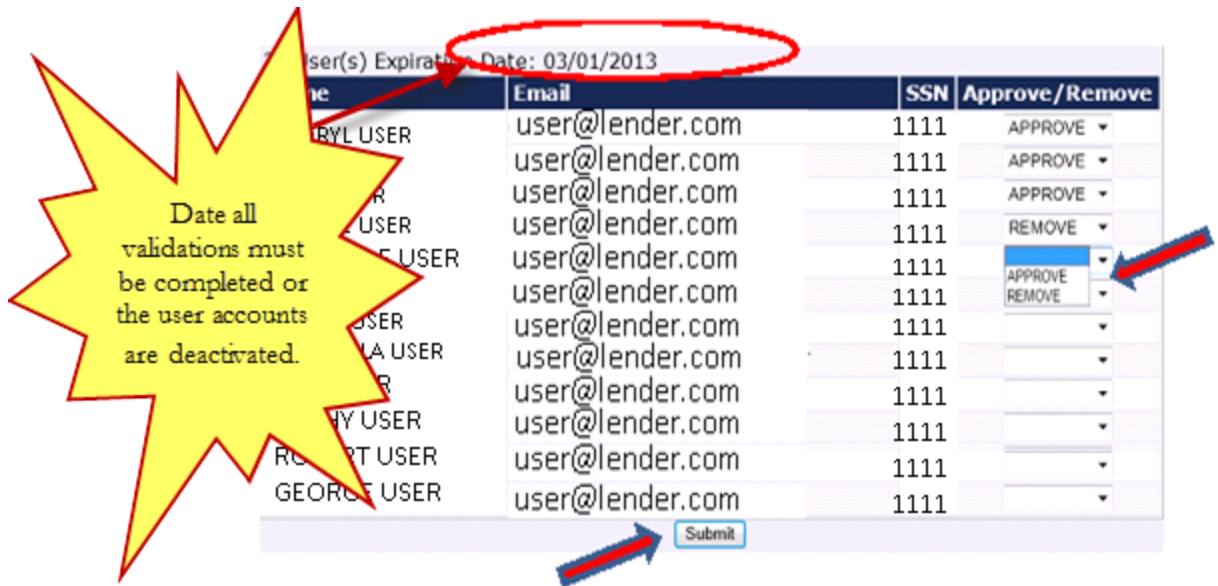
## 1.2. Validating Users

**Note:** If no users are displayed; there are either no pending users that require *Validation*, or another Admin already performed the necessary actions.

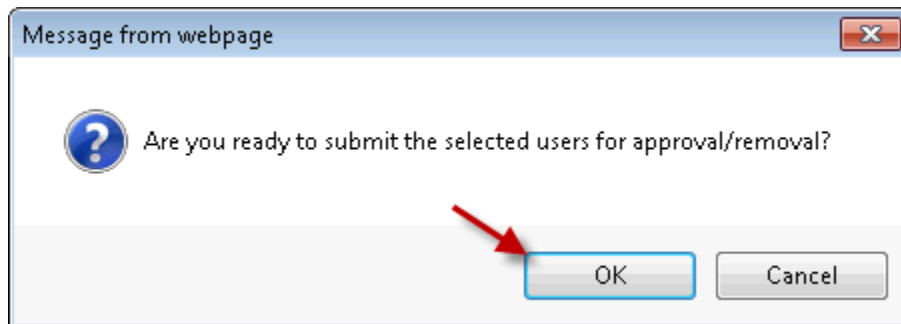
1. Open the WebLGY application.
2. From the top navigation bar, click **Admin** > **Validate Users** > **Lender/Service Users**.



3. In the list view, select **Approve** to validate the user account or **Remove** to deactivate the user account.



4. Click **Submit**.
5. In the pop-up window, click **OK** to confirm your action.



6. The screen will refresh and users selected will no longer appear in the window.

### 1.3. PIN Notification/Location/Reset

PIN Resets are performed automatically every 30-calendar days as a security measure to prevent unauthorized users from accessing lender or servicer accounts.

#### 1.3.1. PIN Reset Notification

1. Only automated PIN Resets generate notifications. Only Lender/Servicer POC's receive these notifications. Future enhancements will include Lender/Servicer Admins.

Subject Line: 30 Day Automated PIN Reset for Lender and Servicer Accounts

PLEASE NOTE: This is for information only - No Action Is Required.

The registration process for the Veterans Information Portal (VIP) requires improved security measures to ensure the privacy of veteran information contained within the portal environment.

Your company is receiving this notification because we identified it as an active lender or servicer affiliate within the VA Home Loan program.

Loan Guaranty Service has reset all PINs associated with our VA Lender/Servicer affiliates.

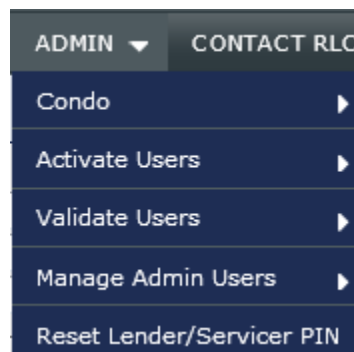
THIS PIN RESET ACTION WILL NOT AFFECT ACTIVE USERS.

ONLY new users should contact their Lender/Servicer Point of Contact (POC) or their Administrator to obtain this new PIN to register within the VIP. These resets do NOT affect current users who are registered within VIP. It is the POC's responsibility to: provide the PIN to ONLY those users needing to register, safeguard the PIN from the general public, and monitor the status of all users to ensure only those personnel who need access to VIP continue to have access. Your company's "lenderServicerName" new PIN is xxxxxxxx. This value is the same for all offices associated with your company.

If you have any questions, please email the VIP Help Desk (VIP.VBACO@va.gov).

### 1.3.2. PIN Location

1. Open the WebLGY application.
2. From the top navigation bar, click **Admin > Reset Lender/Servicer PIN**.



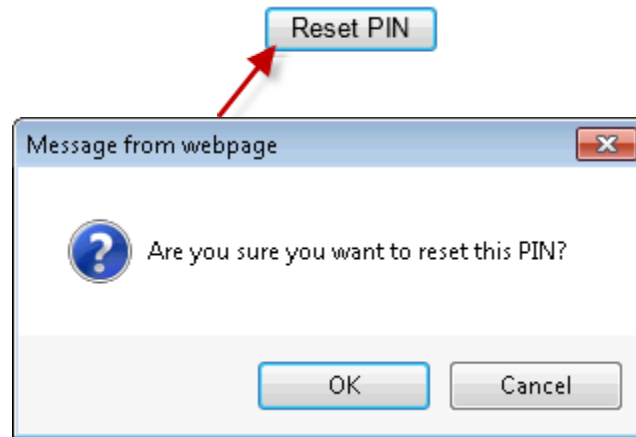
3. **Note:** The current PIN is displayed with the date **Last Changed**.





### 1.3.3. PIN Reset

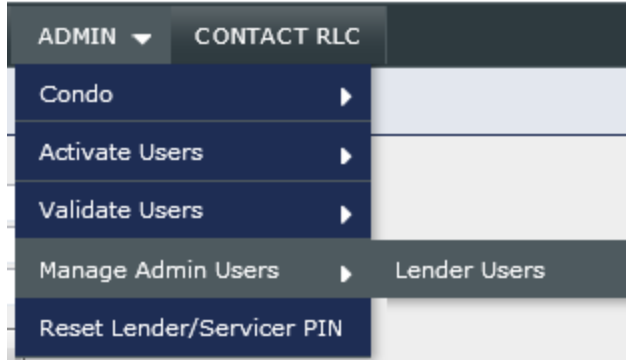
1. Open the WebLGY application.
2. From the top navigation bar, click **Admin > Reset Lender/Service PIN**.
3. If it is necessary to change the PIN, Click **Reset PIN**, and the new PIN will be displayed and the date will be updated. **Note:** Manual PIN reset will change the Automated PIN Reset clock.



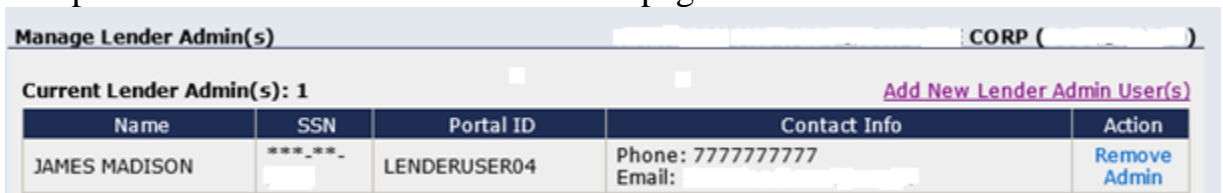
## 1.4. Manage Admin Users and Remove Users

### 1.4.1. Adding Admin Users

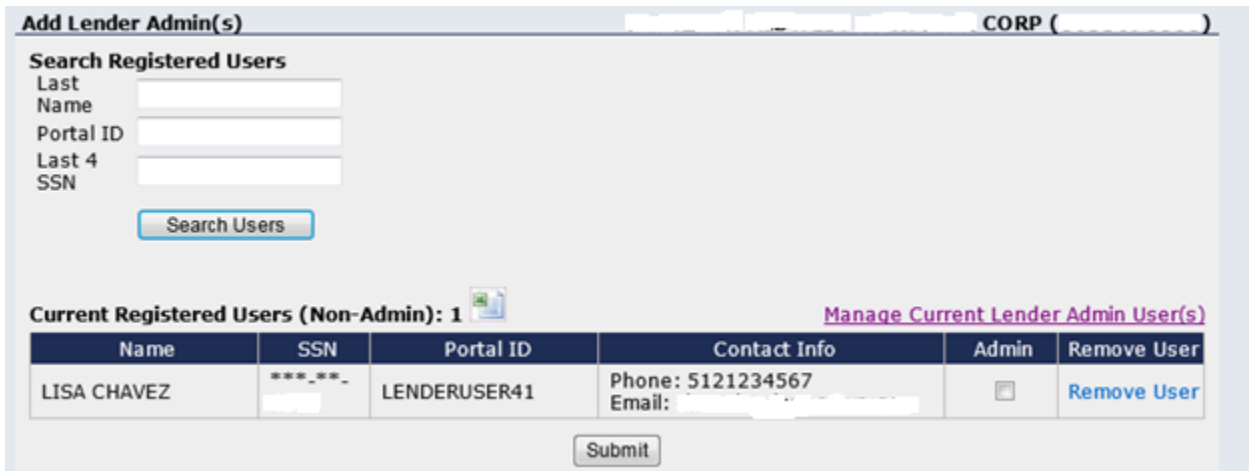
1. Open the WebLGY application.
2. From the top navigation bar, click **Admin > Manage Admin Users > Lender/Service Users** to open the Manage Lender Admin(s) page.



3. Selecting the **Add New Lender/Service Admin User(s)** link (top right) opens the Add Lender/Service Admin page.



4. Place a checkmark in the box under the Admin column in the same row as the person who should obtain Admin functions and click **Submit**.  
**Note:** The user selected should no longer appear in the displayed list.

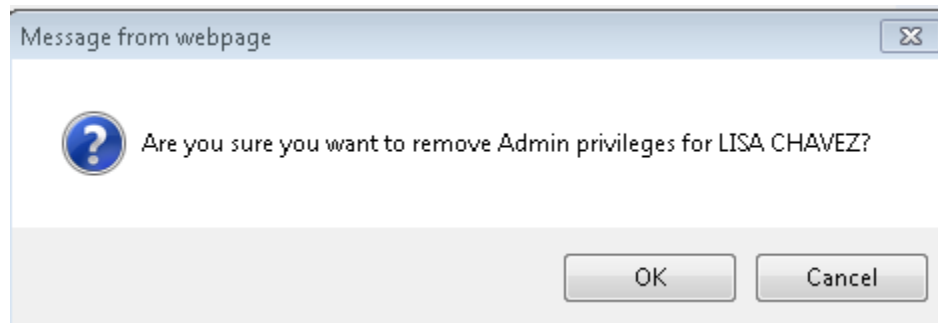


5. Select **Manage Current Lender Admin Users(s)** link to verify the newly added user appears in the list .

Manage Lender Admin(s)		CORP ( )		
Current Lender Admin(s): 2		<a href="#">Add New Lender Admin User(s)</a>		
Name	SSN	Portal ID	Contact Info	Action
LISA CHAVEZ	***-**-	LENDERUSER41	Phone: 5121234567 Email:	<a href="#">Remove Admin</a>
JAMES MADISON	***-**-	LENDERUSER04	Phone: 7777777777 Email:	<a href="#">Remove Admin</a>

### 1.4.2. Removing Admin Functions

1. Open the WebLGY application.
2. From the top navigation bar, click **Admin > Manage Admin Users > Lender/Service User(s)** to open the Manage Lender Admin(s) page.
3. Selecting the **Remove Admin** link from the Action column opens a dialog box asking, “**Are you sure you want to remove Admin privileges for <User Name>?**”



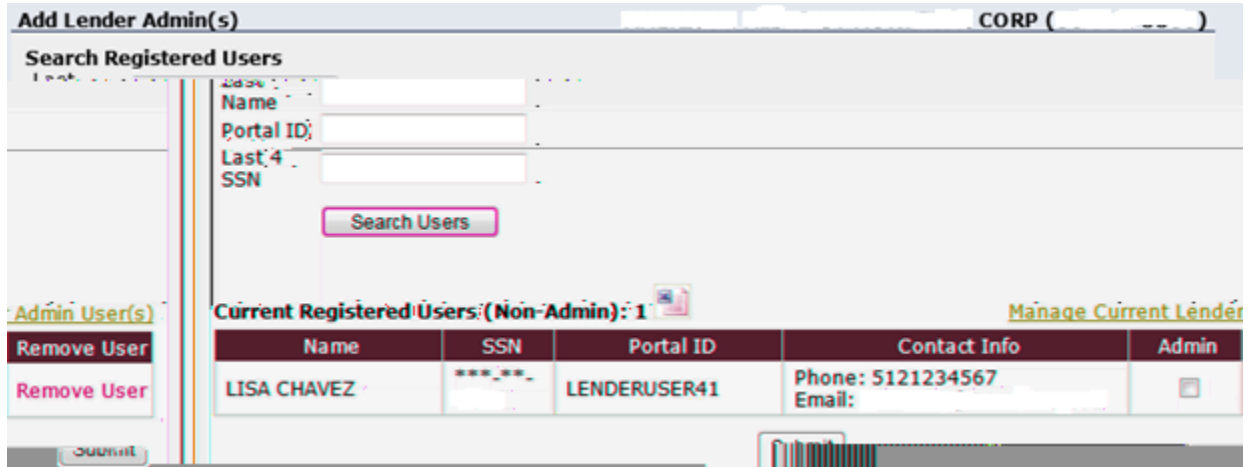
4. Select **OK** to remove Admin privileges or **Cancel** to keep.
5. If **OK** is selected, the user should no longer appear in the list.

Manage Lender Admin(s)		CORP ( )		
Current Lender Admin(s): 1		<a href="#">Add New Lender Admin User(s)</a>		
Name	SSN	Portal ID	Contact Info	Action
JAMES MADISON	***-**-	LENDERUSER04	Phone: 7777777777 Email:	<a href="#">Remove Admin</a>

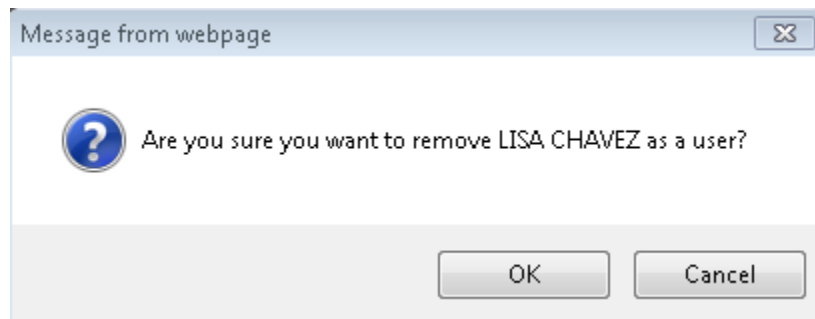
### 1.4.3. Removing Users

1. **Note:** If the user you are removing has Admin Functions, you must first follow Section 1.4.2 Removing Admin Functions.
2. Open the WebLGY application.

3. From the top navigation bar, click **Admin > Manage Admin Users > Lender/Service User(s)** to open the Manage Lender Admin(s) page.
4. Select the **Add New Lender/Service Admin User(s)** link (top right) to open the Add Lender/Service Admin page.



5. Selecting the **Remove User** link from the Remove User column of the user you want to remove will open a dialog box asking, “**Are you sure you want to remove <User Name> as a user?**”



6. Select **OK** to remove user or **Cancel** to keep.
7. If **OK** was selected, the user should no longer appear in the list.