



Native Advantage: Claims Module User Guide

U.S. Department of Housing and Urban Development

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Document History

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| 1.1 | 12-30-2021 | HUD Contractor | Update section 1.4 and 2.2 |



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1. Navigating Native Advantage

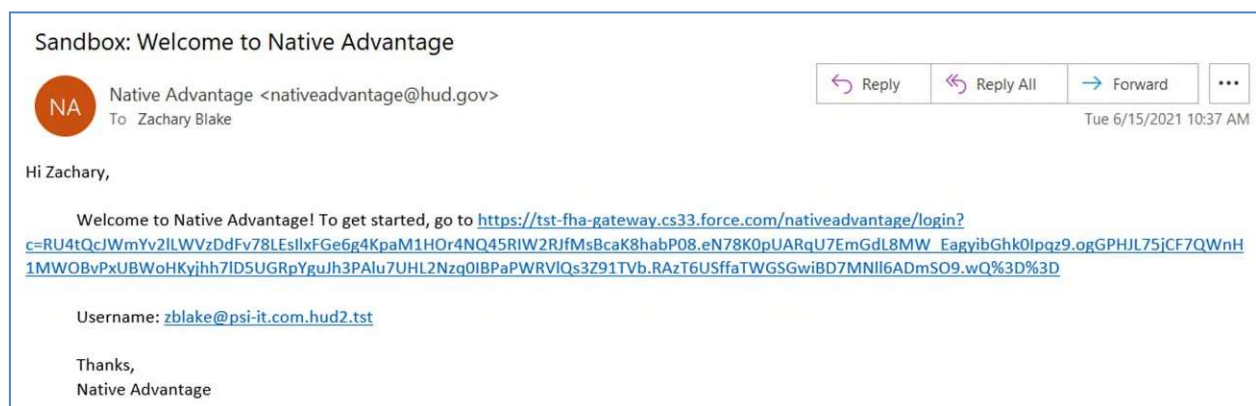
This section provides guidance in navigating Native Advantage. These instructions assist users who require support accessing content.

1.1 Approved Browser – Chrome

Chrome is the only browser approved to work with Native Advantage. Pages and/or features may be non-functional if accessed in any other browser.

1.2 Accessing Native Advantage for the First Time

1. If you have been informed that you will be on-boarded to Native Advantage or you have requested access, you will receive an email detailing your username with a link to set your password from Salesforce.



2. Click on the link provided in the email to access the Native Advantage reset password screen.
3. Enter and confirm your new password, and then click **Change Password**.
4. This will redirect you to the login screen.



1.3 Login to Native Advantage

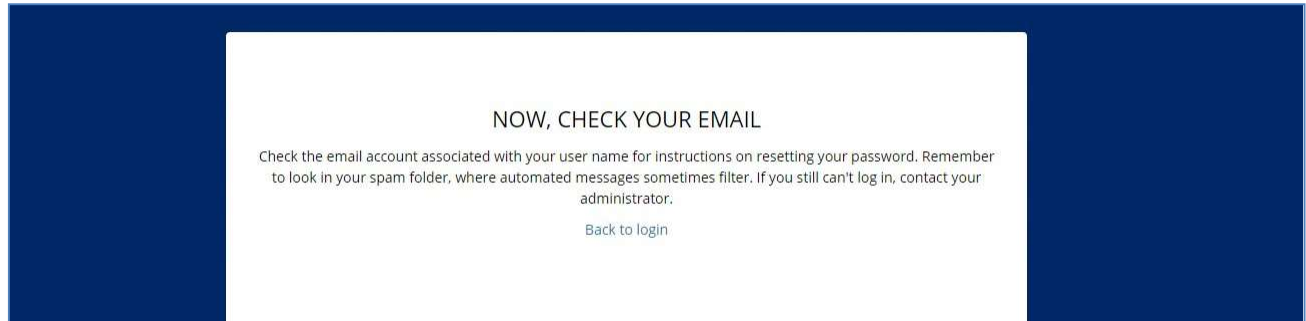
The login form features the Native Advantage logo at the top, which includes a stylized house with a sun and mountains. Below the logo are two input fields: 'Username' and 'Password'. A 'Remember Me' checkbox is located below the password field. To the right of the checkbox is a 'Forgot Password' link. A blue 'Login' button is positioned at the bottom right of the form.

1. Enter your Username and Password, select the Remember Me checkbox, and then click on **Login button**.
2. If your Username and Password are incorrect, you will receive an “invalid login attempt” message. Your account will be locked for 15 minutes If you enter an invalid combination more than three times.
3. If you forget your password, click **Forgot Password** to navigate to a screen where you can request a password reset.

The Password Reset form is displayed on a page with the Native Advantage logo in the top left corner. In the top right corner, there is a search bar and a 'LOGIN' button. The main heading is 'PASSWORD RESET'. Below this, a message states: 'To reset your password, we'll need your username. We'll send password reset instructions to the email address associated with your account.' There is a single input field labeled 'Username' with a user icon. Below the input field is a blue 'Reset Password' button and a 'Cancel' link.



4. Enter your Username and click Reset Password. **Reset Password** issues a message and triggers an email containing a link for you to use to reset your password to a new one.



1.4 My Account Information

1. Select Username on the top right and click 'My Account' and be able to view below lender account information:

- Account Name
- Account Owner
- Lender ID
- Branch ID etc.

| Home/Branch | Parent Account | Lender ID | Branch ID | Phone | Billing Address |
|-------------|----------------|-----------|------------|-------|-----------------|
| Home | | 99999 | 9999900001 | | |

| DETAILS | | RELATED |
|-----------------------|-----------------------------|---------|
| Account Name | Account Owner | |
| Test Lender Company | Preeti Sahu | |
| Account Record Type | Parent Account | |
| Lender | | |
| Lender ID | Phone | |
| 99999 | | |
| Website | Industry | |
| | | |
| Description | Employees | |
| | | |
| ✓ Address Information | | |



2. Claims Entry and Submission

There are general common rules used throughout Native Advantage.

Required Fields: Required fields are indicated by a red asterisk (*) next to the field label. You will be unable to save or submit any Claim that is missing required fields. Some fields are required because of other information entered. For example, 'Previous Claim Type' is required for all Supplemental Claims, so it will show as required when the Claim Type of "01B – Conveyance – Part B" is selected.

Repeated Fields: There are fields that may be entered multiple times and will repeat as many times as the user requires. These "repeaters" are in columns indicated by a red asterisk (*). The data in these "repeaters" are only required if you select the blue 'Add New Item' button below the repeater.

305. Disbursements for HIP, taxes, ground rents and water rates (which were liens prior to mortgage), eviction costs and other disbursements not shown elsewhere. (Do not include penalties for late payment.) Only costs incurred between the dates in Items 8 and 10 of Part A are allowed.

| Date Paid * | Period Covered From * | Period Covered To * | Description * | Amount Paid \$ * |
|---|-----------------------|---------------------|---------------|------------------|
| 305a. Calculated Total Amount Paid (Entered on Line 111, Part B) = \$0.00 | | | | |

[Add New Item](#)

Invalid Data: The Claims Module validates data as it is entered. If the data entered in a field does not meet the validation test (date format, numeric, DUNS, etc.), the error along with the format will be displayed in red under the field and an error message will be displayed at the top of the form.

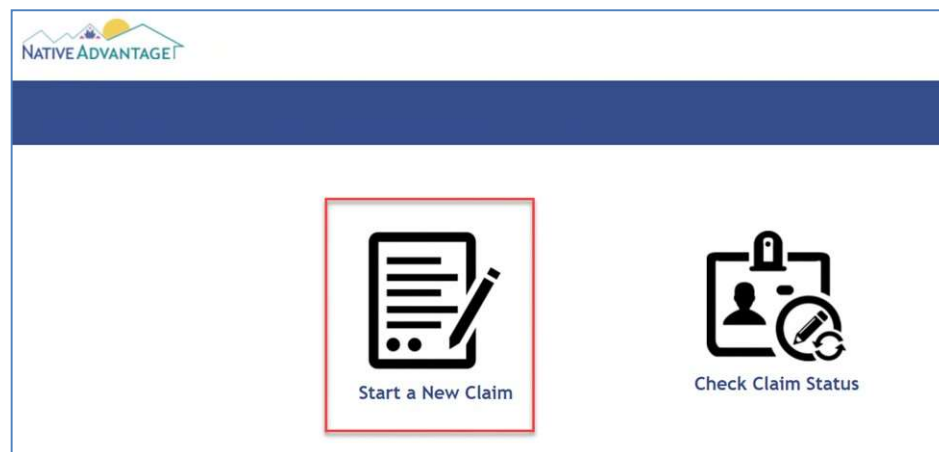
* DUNS Number

1

Must be numeric and exactly 9 digits

2.1 Start a New Claim

1. After logging into Native Advantage, click on **Start a New Claim**.





2. From the Claim Initiation screen, select which claim type you would like to submit, and enter the ONAP Case Number for your claim.
3. From the Claim Initiation screen, select the claim type from the list, and enter data in all Required fields. **Note:** ONAP Case Number is required for all Claim Types.

OMB Approval No. 2502-0589 (Exp. 8/31/2023)

Claim Initiation

Provide the following details to ensure timely processing of this claim submission.

| | |
|------------------------------------|---|
| * 1. Claim Type --Select-- | * 2. ONAP Case Number <input type="text"/> |
| Submission Exception --Select-- | Previous Claim Type --Select-- |

[Save & Next](#)

4. Click **Save & Next**.

2.2 Enter Information in a New Claim

1. Each part of the Claim form (Part A, B, C, D, E) is displayed on separate screens. Enter information based on the data required for the submission of your claim:

Part A - General Information

Provide the following details to ensure timely processing of this claim submission.

| | |
|---|---|
| 1. Claim Type 01A - Conveyance - Part A | 2. ONAP Case Number 000-000001 |
| Submission Exception | Previous Claim Type |
| * 3. Section of the Act Code 184 | * Land Type Fee Simple |
| * 4. Default reason code --Select-- <small>Complete this field.</small> | * 5. Endorsement Date (from LGC) <input type="text"/> <small>Complete this field.</small> |

- Required fields are denoted by red asterisks and the Claim cannot be saved without data in these fields.



- Incorrect data entered is noted underneath all fields that need to be resolved before continuing.

2. For Field 13 Servicing Mortgagee Number, first 5 digits of the field should be equal to their Lender ID e.g., if their lender id 00001 then the field 13 format will be 00001xxxxx (0000111111 or 0000122222 etc.) Otherwise, error message will display as “Must be numeric and exactly 10 digits, and must be valid for your account”

| | |
|--|---|
| <p>* 12.ONAP Holding Lender Number (10 digits)</p> <input type="text" value="1234567822"/> | <p>* 13. Servicing Lender Number (10 digits)</p> <input type="text" value="9999845655"/> <p>Must be numeric and exactly 10 digits, and must be valid for your account</p> |
|--|---|

3. For areas where the same type of information could be asked for multiple times (e.g., Item 32: Schedule of Tax Information) – which will be referred to as Repeaters – users can click on the Add button to add information multiple times. See below:

Clicking on the ‘Add 32. Schedule of Tax Information’ box

32. Schedule of Tax Information

| | |
|--|----------------------------------|
| * 32a. Tax Year | * 32b. Type of Tax or Assessment |
| <input type="text"/> | <input type="text"/> |
| * 32c. Collector's Property Identification | * 32d. Amount Paid |
| <input type="text"/> | <input type="text"/> |
| * 32e. Period Covered From | * 32f. Period Covered To |
| <input type="text" value=""/> | <input type="text" value=""/> |
| * 32g. Date Paid | |
| <input type="text" value=""/> | |

Add 32. Schedule of Tax Information

Adds another set of ‘Schedule of Tax Information’ fields, which can be populated independently of each other.



32. Schedule of Tax Information

* 32a. Tax Year

* 32b. Type of Tax or Assessment

* 32c. Collector's Property Identification

* 32d. Amount Paid

* 32e. Period Covered From

* 32f. Period Covered To

* 32g. Date Paid

32. Schedule of Tax Information

* 32a. Tax Year

* 32b. Type of Tax or Assessment

* 32c. Collector's Property Identification

* 32d. Amount Paid

* 32e. Period Covered From

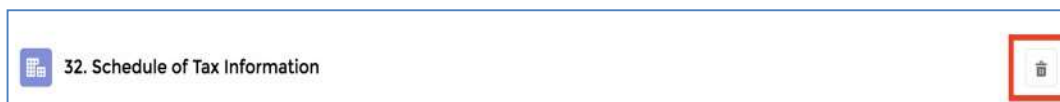
* 32f. Period Covered To

* 32g. Date Paid

Add 32. Schedule of Tax Information



4. To remove a Repeater, click on the trash can icon in the top-right corner by the Repeater you would like to remove.



5. At the bottom of each Form Part, there is an area to add Lender Comments. These comments will carry from one Part to the next and can be edited in each Part.
6. Navigation buttons are at the bottom of each screen. These do the following:
 - **Previous:** Navigates to the previous screen without saving any data on the current screen.
 - **Save & Next:** Saves **all** information in the claim and navigates to the next screen.
 - **Save & Close:** Saves **all** information in the claim and returns the user to the Home page.
 - **Cancel:** Returns the user to the Home page without saving.

2.3 Attach Documents to a Claim

1. At the bottom of each form page, there is a prompt to attach supporting documentation for that Part of a claim:

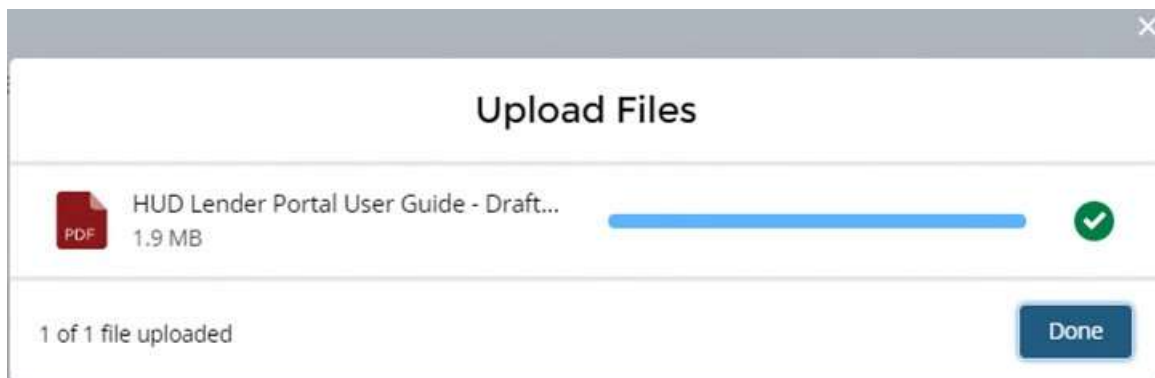
Please attach receipts and other supporting documents. Valid file types are PDF, PNG or JPG. Individual files cannot exceed 25MB.

Files (0) [Upload Files](#) Or drop files

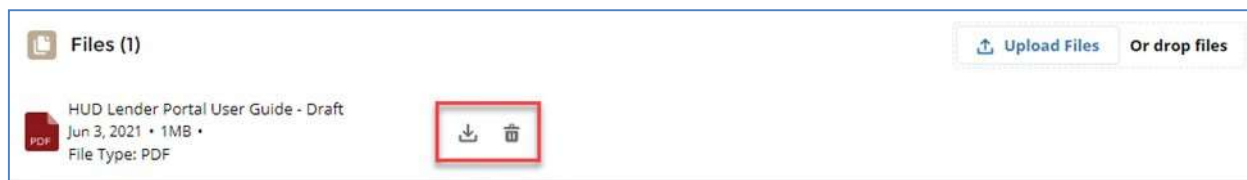
Lender's Comments, If Any

[Previous](#) [Save & Next](#) [Save & Close](#) [Cancel](#)

2. Click on **Upload Files** to attach files or drag and drop files from your computer. Only PDF, PNG, or JPG formats will be accepted. Individual files cannot exceed 25MB in size.
3. After uploading a file, you will be able to view a screen showing the progress of your document being uploaded:



4. Click **Done** after the files have been uploaded.
5. After uploading supporting documentation, you will be able to view the documents from the Attachments section. You can continue to add more documents, download your uploaded files by clicking on the download icon next to each document, or remove them from the claim by clicking on the trash can icon.



2.4 Navigating between Pages

At the bottom of each form page, there are navigation buttons that will allow you to return to the Previous Page, Save the Current Page and Navigate to the next Page (Part), Save and Close the Claim or Cancel. Note – Cancel exits the user immediately from the Claim without saving the current page.

2.4.1 Submit a Claim

1. After completing all Form Parts required to successfully submit a claim and clicking **Save & Next**, you will be taken to a read-only page (only on Form Types that require multiple pages) displaying the information entered on all previous screens.
2. At the bottom of the read-only page, there is a prompt containing a checkbox that must be checked to enable the **Submit** button at the bottom of the form:



Message for Forms with Multiple Pages

HUD Comments

Lender's Comments, If Any

By transmitting, the Lender certifies that the statements and information entered are true and correct.

☐ Ready to transmit claim to HUD?

Please Check the box above to Submit the form

Previous Cancel Submit

By transmitting, the Lender certifies that the statements and information entered are true and correct.

☒ Ready to transmit claim to HUD?

Please Check the box above to Submit the form

Previous Cancel Submit

Message for Forms with One Page

By transmitting, the Lender certifies that the statements and information entered are true and correct.

☒ Ready to transmit claim to HUD?

Please Check the box above to Submit the form

Public Reporting Burden for this collection of information is estimated to average 1.33 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This information is being collected to file a claim for Section 184 or Section 184A loan guarantee benefits. This information is required to obtain mortgage insurance benefits. This agency may not collect this information, and you are not required to complete this form, unless it displays the currently valid OMB control number.

Sensitive Information: Some information collected on this form is considered sensitive and is protected by the Privacy Act. The Privacy Act requires that these records be maintained with appropriate administrative, technical, and physical safeguards to ensure their security and confidentiality. In addition, these records should be protected against any anticipated threats or hazards to their security or integrity which could result in substantial harm, embarrassment, inconvenience, or unfairness to any individual on whom the information is maintained.

Please refer to the Office of Loan Guarantee administrative guidance for any additional submission instructions.

Save & Close Cancel Submit

- After clicking **Submit**, a second pop-up prompt will open to ask you to confirm that you wish to transmit the claim to HUD. Click on **Submit** to complete the Claim Submission process or click **Cancel** to be returned to the read-only page. Only after clicking on the Submit button IN THE POPUP prompt will your Claim be Submitted to HUD.



×

Confirm Claim Submission

WARNING: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012, 31 U.S.C. 3729, 3802)

By transmitting, the Mortgagee certifies that the statements and information entered are true and correct.

Ready to transmit claim to HUD?

Cancel

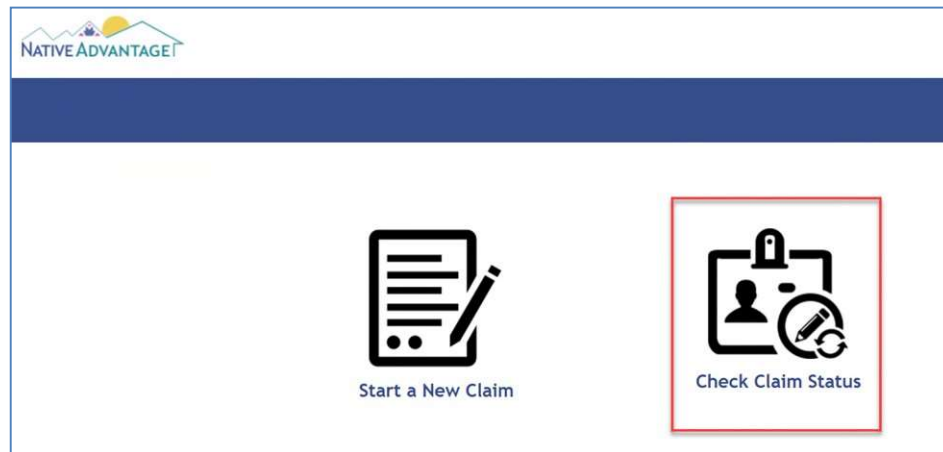
Submit



3. Checking Claim Status

3.1 Review Claim Status

1. To review a list of your (or your lender's, if you are a manager) submitted claims, click on the **Check Claim Status** button.



NTV Form Submissions
Recently Viewed ▼

50+ items • Updated a few seconds ago

Search this list...

| Form... | Form Type | ONAP ... | Lender Refe... | Lender Status | Date/Time Submitted |
|---------|-----------|---|--------------------|---------------|---------------------|
| 1 | F-0000205 | 07 - Pre-Foreclosure Sale (PFS) | 111-546566 65 | Draft | |
| 2 | F-0000206 | 01A - Conveyance - Part A | 000-000001 | Draft | |
| 3 | F-0000143 | 07 - Pre-Foreclosure Sale (PFS) | 111-111111 333 | Draft | 5/26/2021 7:26 PM |
| 4 | F-0000187 | 06 - Claims Without Conveyance of Title (CWCOT) | 111-987545 345 | Submitted | 6/1/2021 6:51 PM |
| 5 | F-0000181 | 02-Assignment | 123-345333 423423 | Submitted | 6/1/2021 6:49 PM |
| 6 | F-0000195 | 05-Supplemental | 000-011111 234 | Submitted | 6/1/2021 6:47 PM |
| 7 | F-0000188 | 31-Special Forbearance | 023-456444 2 | Submitted | 6/1/2021 6:46 PM |
| 8 | F-0000189 | 32-Loan Modification | 444-555555 243 | Submitted | 6/1/2021 6:45 PM |
| 9 | F-0000186 | 07 - Pre-Foreclosure Sale (PFS) | 123-878888 2234234 | Submitted | 6/1/2021 6:44 PM |
| 10 | F-0000200 | 01A - Conveyance - Part A | 000-777777 234 | Submitted | 6/1/2021 6:40 PM |

2. After clicking on Check Claim Status, you can view various filtered lists of your claims. To update your filter criteria:
 - a. Click on the dropdown icon in the top-left corner (next to the pin icon).
 - b. Click on the view that contains the claims you would like to see (My Submitted Claims, My Paid Claims, etc.)



- c. If you want your selected view to be shown to you by default every time you navigate to this page, click on the pin icon.
3. Each list shows the following information:
 - a. The Form Submission Number (the system-generated reference number for your Claim)
 - b. The Type of Form (e.g., '05-Supplemental')
 - c. ONAP Case Number
 - d. Lender Reference Number
 - e. Lender Status (Paid, Submitted, Draft, etc.)
 - f. Date/Time Submitted
4. To view a read-only version (post-submission) or an editable version (if in a draft status) of your claim, click on your Form Submission number.

The screenshot shows the 'NTV Form Submissions' interface. At the top, it says 'Recently Viewed' with a pin icon. Below this, it indicates '50+ items • Sorted by Lender Status • Updated a few seconds ago'. There is a search bar labeled 'Search this list...' and several icons for settings, view, refresh, edit, and filter. A 'New' button is in the top right corner. The table below has the following columns: 'Form...' (with a dropdown arrow), 'Form Type' (with a dropdown arrow), 'ONAP...' (with a dropdown arrow), 'Lender Refe...' (with a dropdown arrow), 'Lender Status ↓' (with a dropdown arrow), and 'Date/Time Submitted'. The first row of data is highlighted with a red box around the 'Form Submission Number' 'F-0000171'. The table contains three rows of data.

| | Form... | Form Type | ONAP... | Lender Refe... | Lender Status ↓ | Date/Time Submitted |
|---|-----------|---------------------------|------------|-----------------|--------------------|---------------------|
| 1 | F-0000171 | 01B - Conveyance - Part B | 000-111111 | 65456456 | Payment In Process | 5/27/2021 11:06 AM |
| 2 | F-0000173 | 02-Assignment | 000-112233 | 5656 | Review Complete | 5/27/2021 12:03 PM |
| 3 | F-0000056 | 05-Supplemental | 111-112233 | 123123123123123 | Review Complete | 5/12/2021 9:50 AM |