

# Welcome to the Inaugural Healthcare Mortgagee Advisory Council Conference 2018



October 25 – 26, 2018



# Production Portal Preparation

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Moderator: Raelee Jones, Wells Fargo Bank

Panelist: Nikki Hoffpauir, Krooth & Altman

Panelist: Chris Painter, Eagle Bank

HUD/ORCF: Susan Gosselin, ORCF Production

HUD/ORCF: Jason Roth, ORCF Closing

# OFFICE OF HEALTHCARE PROGRAMS

Washington, D.C.



# 232 Healthcare Portal Production

The Journey:

- Dream – Oracle
- First – MF/OHP AUS
- Then – 232 Healthcare Portal – Asset Management module
- NOW! - 232 Healthcare Portal – Production module



# 232 Healthcare Portal Production

- Beta Testing began August 2017 for Lenders and HUD.
- 8 Applications submitted through the Production Module.
- Currently:
  - Awaiting FHA Number Assignment – 5
  - FHA Number InProcess – 2
  - FHA Number Issued – 28
  - Application Firm Issued – 8
  - Closing – InProcess – 2
  - Closing – Final Closing Complete – 5



# 232 Healthcare Portal Production

- Key Benefits:
  - Revolutionize Underwriting & Closing process
  - Direct Electronic submissions – saves time & money
  - Improves efficiency of reviews
  - Facilitate coordination between Lender teams and ORCF
  - Transparency of review process – Lender can see immediate identification of the Underwriter, Technical Reviewers, Closers, OGC
  - Access for Contract UW's and Contract Closers



# 232 Healthcare Portal Production

- Available for Application Submissions on –  
October 1, 2018
- Requirement for Application Submissions on –  
December 1, 2018



# 232 Healthcare Portal Production

Home - ORCF Healthcare Deve... | Landing - HUD Healthcare ...

File Edit View Favorites Tools Help

ORCF Healthcare Develop... | Time & Attendance | HUD @ Work | HUD Healthcare Portal | Home - ORCF Healthcare ... | CommunicationsCmr | Projects - Underwriter | Legal Warnings (2) | Office of Residential Care ... | Operational Risk Manage...

**232 Healthcare Portal**

Version 3.0.0.0  
Log out  
Welcome LAM Prudential  
Lender Account Manager

Home | Tasks(3) | Group Tasks | Financial Analysis | Asset Management | **Production** | Administration | Contact Us

Home > Landing

- Office of Residential Care Facilities
- Healthcare Mortgage Insurance Program H
- Contact an Employee
- Loan Servicing and Asset Management of 23
- Section 232 Forms and Documents

FHA# Request  
Initiate IRR Request  
Application Process  
Construction Application Process ▶  
Closing Process ▶  
Amendments  
Production Lender PAM Report

White House  
single-story  
Nashville, TN  
Elizabeth Seto  
Program Celebr  
Pediatric Cent

The Lodge at Natchez Trace, located in  
Nashville, Tennessee Welcomes New Residents

at, formerly  
ouis Park, ... miles north of  
an to welcome ... beds.

and the 232  
abeth seton

https://www.staging232health.com/FHARRequest/Index

125% | 7:29 AM | 10/12/2018





# FHA Number Request

Browser navigation bar showing the URL <https://www.staging232health.com/FHARequest/Index> and various browser tabs and icons.

Home > Production > FHA # Request

## FHA# Request Form

Fields with \* are mandatory

### Application General Information

Project Name *	<input type="text"/>
Type of Project *	<input type="text" value="Select Project Type"/>
Current FHA Project#	<input type="text"/>
Type of Current Loan(if 223a7)	<input type="text" value="Select Current Loan Type"/>
Property ID#	<input type="text"/>
Type of Activity(if 223f)	<input type="text" value="Select Activity Type"/>
Type of Mortgage Insurance *	<input type="text" value="Select Mortgage Insurance Type"/>
Project Street Address *	<input type="text"/>
Project City *	<input type="text"/>
Project State *	<input type="text" value="Select State"/>
Lender Name	<input type="text" value="PRUDENTIAL HUNTOON PAIGE ASSOCIATI"/>
Lender Contact Name *	<input type="text"/>
Lender Contact Email *	<input type="text"/>
Lender Contact Phone *	<input type="text"/>

Borrower Type *	<input type="text" value="Select Borrower Type"/>
Proposed Loan Amount *	<input type="text" value="\$ 0.000"/>
Re-enter Loan Amount *	<input type="text" value="\$ 0.000"/>
Proposed Interest Rate *	<input type="text" value="0"/>
Project Zip Code *	<input type="text"/>
Congressional District *	<input type="text" value="0"/>
Lender ID#	<input type="text" value="34489"/>

### Project Characteristics

Skilled Nursing :	<input type="text" value="0"/>	Beds	<input type="text" value="0"/>	Units
Assisted Living :	<input type="text" value="0"/>	Beds	<input type="text" value="0"/>	Units
Board & Care :	<input type="text" value="0"/>	Beds	<input type="text" value="0"/>	Units
Memory Care :	<input type="text" value="0"/>	Beds	<input type="text" value="0"/>	Units
Independent :	<input type="text" value="0"/>	Beds	<input type="text" value="0"/>	Units
Other :	<input type="text" value="0"/>	Beds	<input type="text" value="0"/>	Units
CMS Star Rating	<input type="text" value="Select CMS Star Rating"/>			
Master Lease Proposed? *	Yes <input type="radio"/> No <input type="radio"/>			

Additional Financing Resources	LIHTC <input type="checkbox"/>
	Tax-Exempt Bonds <input type="checkbox"/>
	HOME <input type="checkbox"/>
	CDBG <input type="checkbox"/>
	Other <input type="checkbox"/>

Projects with Common Control (whether part of a Small, Mid/Size or Large Portfolio)\*\*

Windows taskbar showing various application icons and system tray information including the time 7:35 AM and date 10/12/2018.



# Application Submission

Browser address bar: <https://www.staging232health.com/ProductionApplication/Index>

Browser tabs: Home - ORCF Healthcare Deve..., Project Action Request For...

Browser menu: File Edit View Favorites Tools Help

Browser toolbar: ORCF Healthcare Develop..., Time & Attendance, HUD @ Work, HUD Healthcare Portal, Home - ORCF Healthcare ..., CommunicationsCmr, Projects - Underwriter, Legal Warnings (2), Office of Residential Care ..., Operational Risk Manage...

Breadcrumbs: Home > Production > Application Process

## Application Process Form

FHA Number \*

Project Number

Property Name

Property Address

Street Address \*

City \*

State \*

Zip code \*

Is the property address listed correctly? Yes  No

Requester's Name

Date of Lenders's Submission

Project Loan Type \*

Rearrange FILES Copy FILES Attachment

File Upload Grid	Add/Remove Folders	File Name	File Size(KB)	File Uploaded Date	Remove Attachment	Upload Files	New File Name
Section 00: Asset Management Controlling Documents _A						<input type="button" value="Upload"/>	
Section 1: Underwriting _A						<input type="button" value="Upload"/>	
Section 2: Third-Party Reports _A						<input type="button" value="Upload"/>	
Section 3: Borrower _A						<input type="button" value="Upload"/>	
Section 4: Principal of Borrower _A						<input type="button" value="Upload"/>	
Section 5: Operator _A						<input type="button" value="Upload"/>	
Section 6: Parent of Operator _A						<input type="button" value="Upload"/>	
Section 7: Management Agent _A						<input type="button" value="Upload"/>	

Windows taskbar: Start button, Search, File Explorer, Edge, Outlook, Word, Excel, PowerPoint, Chrome, Teams, OneDrive, Task View, System tray (Network, Volume, Battery, Time: 7:36 AM 10/12/2018)



# Closing Submission

Browser: <https://www.staging232health.com/ProductionClosing/DraftClosing>

Home > Production > Closing Request (Non-Construction Draft Closing)

### Non-Construction Draft Closing

FHA Number \*

Project Number

Property Name

Property Address

Street Address \*

City \*

State \*

Zip code \*

Is the property address listed correctly? Yes  No

Requester's Name

Date of Lenders's Submission

Project Loan Type \*

Rearrange FILES Copy FILES Attachment

Folder View	Add/Remove Folders	File Name	File Size(KB)	File Uploaded Date	Remove Attachment	Upload Files	New File Name
Section 17: Closing_A						<input type="button" value="Upload"/>	

Lender Comments

I acknowledge that I received the request for processing, and that I have reviewed it for completeness, accuracy and eligibility, in accordance to the Healthcare Mortgage Insurance



# Lender PAM Report

Browser address bar: <https://www.staging232health.com/ProdLenderPAM/Index>

Navigation tabs: Home - ORCF Healthcare Deve..., Production Lender PAM Re...

Menu: File Edit View Favorites Tools Help

Taskbar: ORCF Healthcare Develop..., Time & Attendance, HUD @ Work, HUD Healthcare Portal, Home - ORCF Healthcare ..., CommunicationsCmr, Projects - Underwriter, Legal Warnings (2), Office of Residential Care ..., Operational Risk Manage...

Status:

All selected (3) ▾

From Date:

To Date:

Search



Production Lender PAM									
Start Date	End Date	Days Active	Loan Amount	Lender Name	User Role	IsReassigned	Status	Processed By	Task/Role
Production Type: FHA# REQUEST									
Production Type: APPLICATION REQUEST									
018	07/25/2018	0	\$100,000.00	prudentialtestlam@gmail.co	LenderAccountManager	No	Closed	markham.w.stickney@hud.g	UnderWriter
018	08/15/2018	0	\$1,000,000.00	prudentialtestlam@gmail.co	LenderAccountManager	No	Closed	markham.w.stickney@hud.g	UnderWriter
018	08/13/2018	0	\$100,000.00	prudentialtestlam@gmail.co	LenderAccountManager	No	Closed	markham.w.stickney@hud.g	UnderWriter
018	08/02/2018	0	\$100,000.00	prudentialtestlam@gmail.co	LenderAccountManager	No	Closed	markham.w.stickney@hud.g	UnderWriter
018	08/29/2018	8	\$2,000,000.00	prudentialtestlam@gmail.co	LenderAccountManager	No	Closed	markham.w.stickney@hud.g	UnderWriter
018		24	\$10,918.00	prudentialtestlam@gmail.co	LenderAccountManager	No	In Queue	april.j.edmunds@hud.gov	UnderWriter
018		37	\$100,000.00	prudentialtestlam@gmail.co	LenderAccountManager	No	In Queue	april.j.edmunds@hud.gov	UnderWriter
018		37	\$10,000,000.00	prudentialtestlam@gmail.co	LenderAccountManager	No	In Queue	april.j.edmunds@hud.gov	UnderWriter
018	10/03/2018	28	\$10,000,000.00	prudentialtestlam@gmail.co	LenderAccountManager	No	Closed	markham.w.stickney@hud.g	UnderWriter
018	09/19/2018	0	\$3,211,000.00	prudentialtestlam@gmail.co	LenderAccountManager	No	Closed	susan.gosselin@hud.gov	UnderWriter
018	10/09/2018	19	\$1.00	prudentialtestlam@gmail.co	LenderAccountManager	No	Closed	RASHEEDAH.C.DIX@hud.g	UnderWriter
End Date	Days Active	Loan Amount	Lender Name	Lender Role	IsReassigned	Status	Processed By	View Name	RAI
10/09/2018	19	\$1.00	prudentialtestlam@gmail.	LenderAccountManager	No	Closed	RASHEEDAH.C.DIX@hu	Underwriter/Closer	No
10/09/2018	19	\$1.00	prudentialtestlam@gmail.	LenderAccountManager	No	Closed	april.j.edmunds@hud.gov	Survey	No
10/09/2018	19	\$1.00	prudentialtestlam@gmail.	LenderAccountManager	No	Closed	april.j.edmunds@hud.gov	Environmentalist	No
10/09/2018	19	\$1.00	prudentialtestlam@gmail.	LenderAccountManager	No	Closed	contractuw@yahoo.com	Attorney	No
018	10/09/2018	0	\$1.00	prudentialtestlam@gmail.co	LenderAccountManager	No	Closed	april.j.edmunds@hud.gov	UnderWriter
018		32	\$1,002.00	prudentialtestlam@gmail.co	LenderAccountManager	No	In Queue	april.j.edmunds@hud.gov	UnderWriter

Windows taskbar: 125% zoom, 7:40 AM, 10/12/2018



# Request for Additional Information (RAI)

Browser address bar: <https://www.staging232health.com/ProductionMyTask/Index>

Page Title: 232 Healthcare Portal

Version 3.0.0.0  
 Log out  
 Welcome LAM Prudential Lender Account Manager

Home > Tasks > My Production Tasks

Task Name	Project Name	Status	Lender	Type	Assigned To	Last updated	Comments	Duration	Ready for Application
Production Type: <b>FHA# REQUEST</b>									
Production Type: <b>APPLICATION REQUEST</b>									
<a href="#">(022-22111)Purchase/Refinance 223(f)</a>	Susans sandcastle	■	PRUDENTIAL HUNTOON PAIGE ASSOCIATES LLC	APPLICATION REQUEST	prudentialtestlam@gmail.com	10/09/2018		19 Days	
<a href="#">RAI (022-22111)Purchase/Refinance 223(f)</a>	Susans sandcastle	■	PRUDENTIAL HUNTOON PAIGE ASSOCIATES LLC	APPLICATION REQUEST	prudentialtestlam@gmail.com	09/21/2018		1 Day	
<a href="#">RAI (022-22111)Purchase/Refinance 223(f)</a>	Susans sandcastle	■	PRUDENTIAL HUNTOON PAIGE ASSOCIATES LLC	APPLICATION REQUEST	april.j.edmunds@hud.gov	09/20/2018		0 Day	
<a href="#">(000-43072)Purchase/Refinance 223(f)</a>	Aprils Apple Tree	■	PRUDENTIAL HUNTOON PAIGE ASSOCIATES LLC	APPLICATION REQUEST	prudentialtestlam@gmail.com	10/09/2018		0 Day	
<a href="#">RAI (000-43072)Purchase/Refinance 223(f)</a>	Aprils Apple Tree	■	PRUDENTIAL HUNTOON PAIGE ASSOCIATES LLC	APPLICATION REQUEST	april.j.edmunds@hud.gov	10/09/2018		0 Day	



# Request for Additional Information (RAI)

Browser address bar: <https://www.staging232health.com/ProductionApplication/GetApplicationFormDetail?model=HUDHealthcarePortal.Model.OPAViewModel>

Browser tabs: Home - ORCF Healthcare Deve..., HUD Healthcare Portal

Browser menu: File Edit View Favorites Tools Help

Browser toolbar: ORCF Healthcare Develop..., Time & Attendance, HUD @ Work, HUD Healthcare Portal, Home - ORCF Healthcare ..., CommunicationsCmr, Projects - Underwriter, Legal Warnings (2), Office of Residential Care ..., Operational Risk Manage..., Page, Safety, Tools

## Production Application - Request Additional Information (Completed)

**FHA Number** 022-22111  
**Project Number** 800244397  
**Property Name** Susans sandcastle

### Property Address

**Street Address** 123 fake  
**City** markhamville  
**State** AK  
**Zip code** 11111

Is the property address listed correctly? **Yes**  **No**

**Requester's Name** LAM Prudential  
**Date of Lender's Submission** 09/20/2018 10:10 AM  
**Project Loan Type** Purchase/Refinance 223(f)

Documentation Grid									
Folder View	Action	Name	Role	Comment	File History	Expected File Name	Attached File	File Size(KB)	
<input type="radio"/> Request Additional Submit	Request Additional Submit	LAM Prudential	LAM						
<input type="radio"/> Request Additional Submit	Request Additional Submit	LAM Prudential	LAM						
<input type="radio"/> Request Additional Submit	Request Additional Submit	LAM Prudential	LAM						

View 1 - 3 of 3

Windows taskbar: Start button, Search, File Explorer, Edge, Outlook, Word, Excel, PowerPoint, Chrome, Firefox, Skype, Teams, OneDrive, File History, Network, Volume, Battery, 125% zoom, 7:45 AM, 10/12/2018



# Production Module Users

- Lender Representatives
- ORCF UW's and Technical Reviewers
- Contract UW's
- ORCF Closers
- Contract Closers
- Lender Counsel
- HUD OGC
- Provides a tracking mechanism and central repository for all comments on the project that can be viewed by all.



# Closings & Beyond

- OGC interested in using the Portal – only one closing package will need to be submitted; Closing Checklist is the same for OGC & ORCF;
- Faster Amendment & Extension Amendment processes;
- Post Closing – All executed critical documents will be uploaded to the Portal. CDs will no longer be required to be sent to ORCF or OGC;
- Hard copies no longer required – All documents will be automatically saved in the TransAccess system, as the official archives for the Department;
- Non Critical Repair Escrows will be processed thru the Portal by the ORCF Closers.





# 232 Healthcare Portal Production

- Training Dates:

- Thursday, September 20, 2018 1:30PM EDT - 4:30PM EDT (Completed)
- Thursday, October 11, 2018 1:30PM EDT - 4:30PM EDT
- Thursday, November 1, 2018 1:30PM EDT - 4:30PM EDT
- Archived training to be posted to [www.hud.gov](http://www.hud.gov)



# 232 Healthcare Portal Production

- Training Topics for Lenders:
  - Submitting a FHA Number Request
  - Submitting an Application
  - Requests for Additional Information (RAI)
  - Submitting Closing Documents
- FAQ's
- <https://www.232hudhealthcare.com/>



**X: There is No Final Destination on  
the Improvement Journey**



# Lender Input

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# Attorney Input

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