

How to Sign Up for Eligibility Determination Session Appointments

Working Together for Strong Communities

Steps for Borrower

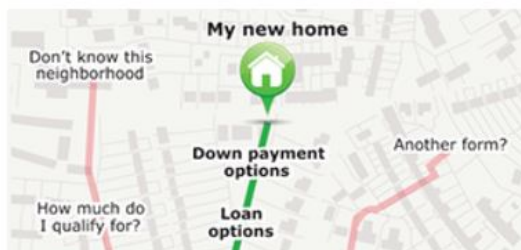
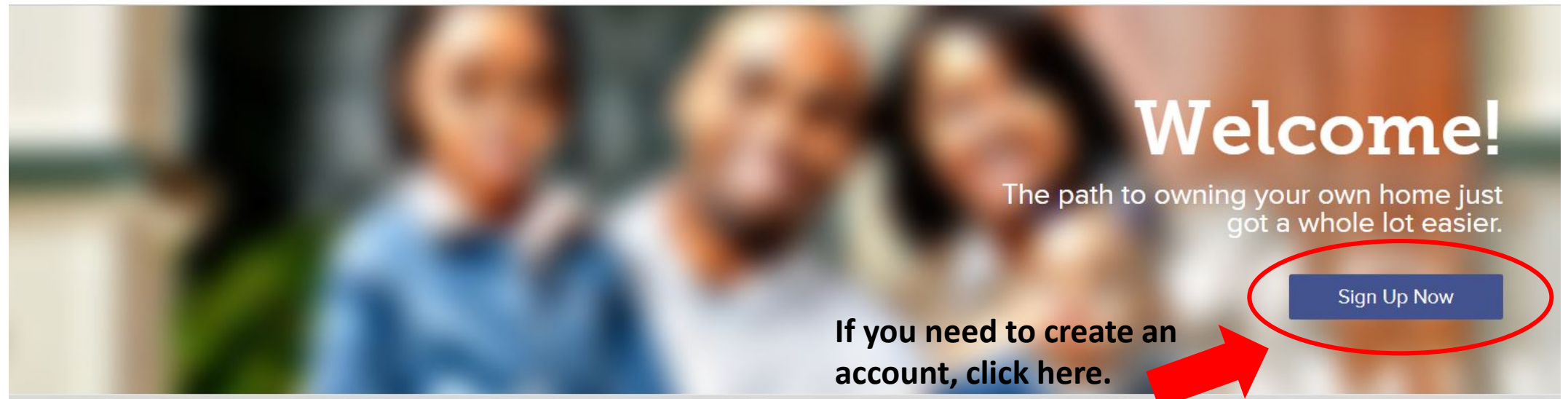
Please complete the steps in the following pages, if you can answer “yes” to the following questions!

1. I have a preapproval letter for a first mortgage from a NeighborhoodLIFT® program approved lender
2. I have a fully executed purchase and sale agreement on a home located in Allegheny county, PA.

Steps for Borrower

Follow these steps if you need to create an account.

1. Visit <https://nwwpa.force.com/nwwpacft>. Click the “Sign Up Now” button.
2. Click the small down arrow next to the NeighborhoodLIFT option.
3. Check the “I am interested in the NeighborhoodLIFT program” check box.
4. Select an area under the “What is the primary area in which you are looking to purchase a home?” drop down.
5. Under the “Available Areas” section click on any additional areas you are interested in purchasing. They will move to the list under “Selected Areas.”



When it comes to deciding who to work with when you are in the market for a new home, NeighborWorks Western Pennsylvania knows that you have lots of options. So why should you work with us, especially when we're asking questions the other guys don't?

We use the information you provide to create a home purchase package that is unique to you. Our team

Tell us more about what services you're interested in

For us to help you, we need to know which of the services that we offer that you would like to know more about. Please read the descriptions of the programs and services we offer below, and then select the ones you're interested in and then we can get started crafting a custom plan just for you!

▼ NeighborhoodLIFT®

\$XX,XXX down payment assistance grants available to eligible buyers in the LIFT Geography

▼ Foreclosure Prevention

Foreclosure Prevention & Intervention services

▼ Consumer Lending

Do you need a personal, small dollar, or auto loan? We have great rates with flexible repayment periods.

▼ Existing Homeowner Services

Already own your home? Click here to see our existing homeowner services!

▼ New Home Purchase

Thinking about purchasing a new home? We can help you get into a new home!

☐ I agree to the [Consent to Receive Documents Electronically](#)

Continue

Already have an account? [Sign In](#)

Click the down
arrow to expand
this option.



Tell us more about what services you're interested in

For us to help you, we need to know which of the services that we offer that you would like to know more about. Please read the descriptions of the programs and services we offer below, and then select the ones you're interested in and then we can get started crafting a custom plan just for you!

▼ NeighborhoodLIFT®

\$XX,XXX down payment assistance grants available to eligible buyers in the LIFT Geography

☒ I am interested in the LIFT program.

What is the primary area in which you are looking to purchase a home? *

Area 1

What other areas are you interested in?

Please click on one or more of the locations listed in "Available Areas" to move it to the "Selected Areas" column; to remove a selection from the "Selected Areas" column, simply click on that selection to move it back to "Available Areas".

Available Areas

Area 1.
Area 3
Area 4
Area 5
Area 6
Area 7

Selected Areas

Area 2

▼ Foreclosure Prevention

Foreclosure Prevention & Intervention services

▼ Consumer Lending

Do you need a personal, small dollar, or auto loan? We have great rates with flexible repayment periods.

Steps for Borrower

Follow these steps if you need to create an account (continued).

1. If you would like to receive your loan disclosures via email, please check the “I agree to Consent to Receive Documents Electronically” check box.
2. Hit the “Continue” button.

Please click on one or more of the locations listed in "Available Areas" to move it to the "Selected Areas" column; to remove a selection from the "Selected Areas" column, simply click on that selection to move it back to "Available Areas".

Available Areas

Area 1.	▲
Area 3	
Area 4	
Area 5	
Area 6	
Area 7	▼

Selected Areas

Area 2	▲
	▼

▼ Foreclosure Prevention

Foreclosure Prevention & Intervention services

▼ Consumer Lending

Do you need a personal, small dollar, or auto loan? We have great rates with flexible repayment periods.

▼ Existing Homeowner Services

Already own your home? Click here to see our existing homeowner services!

▼ New Home Purchase

Thinking about purchasing a new home? We can help you get into a new home!

☒ I agree to the [Consent to Receive Documents Electronically](#)

Continue

Already have an account? [Sign In](#)

If you would like to receive disclosures related to your loan via email, click this box.

Steps for Borrower

Follow these steps if you need to create an account (continued).

1. Enter the following information on the next screen:
 - First name
 - Last name
 - Email address
 - Phone number
 - Choose how you heard about our organization
2. Hit the “Create Account” button.

Create Your Free Account

First Name *

LIFT

Last Name *

Customer

Email Address *

liftcustomer10@yopmail.com

Confirm Email Address *

liftcustomer10@yopmail.com

Phone Number

5559876543

How did you hear about us? *

Radio / Radio

Continue

Steps for Borrower

1. You will be taken to a screen letting you know that a confirmation email will be in your email inbox to activate your account.
2. If you don't receive this email, check your junk mail folder.



Check Your Email

LIFT, you should have received a confirmation email to the address liftcustomer@yopmail.com. Please click on the email to activate your account and begin taking advantage of all that Best Org Ever!! has to offer. If you do not receive this email in your inbox, please check your junk mail folder.

Steps for Borrower

1. You will receive an email in order to confirm your account. Click on the “Confirm Account” link in your email.
2. You will be taken to a page to set up your password. Please be sure to use a password that contains:
 - 8 characters
 - Combination of letters, numbers and a special character (!#\$%_+=, etc)
3. Ensure your password matches in both boxes (New Password & verify your new password)
4. Click the “Set Password” button.

Set Password

Set your password

Your password must be at least 8 characters long and have a mix of letters, numbers and at least one of these special characters: !#\$%&_+=<>

New Password

.....

Verify your new password

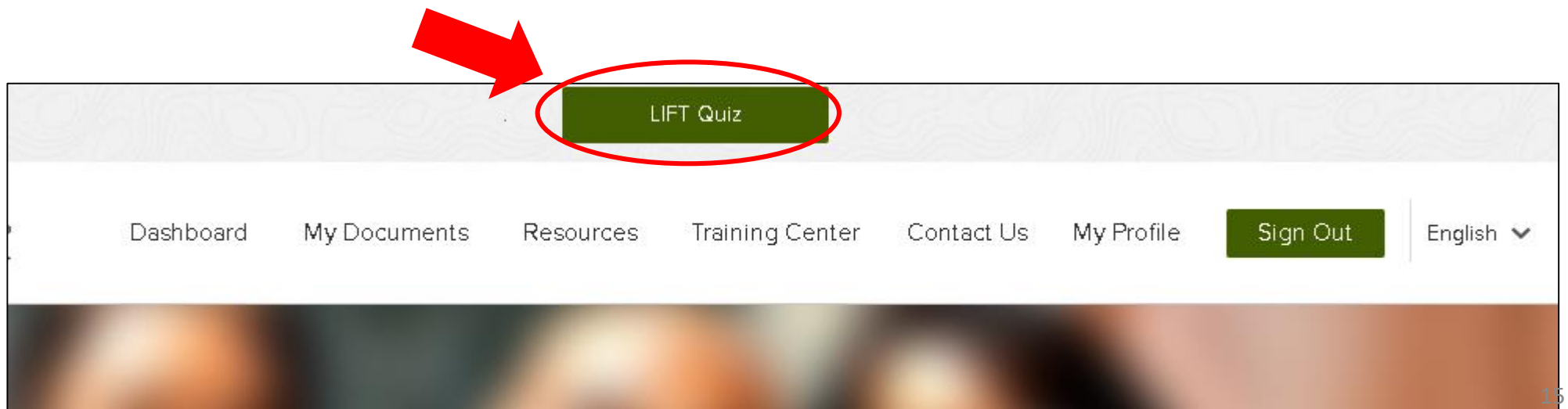
.....|

Set Password

Steps for Borrower

Once you are logged into your account, you will need to complete the steps in the following pages of this guide.

1. Take the LIFT Quiz by clicking the LIFT Quiz button at the top of your screen.



Completing the LIFT Quiz

1. Another screen will pop up (make sure your pop-up blocker will allow this).
2. Answer both questions on the LIFT Quiz. Remember only answer “Yes” to both of these questions if you have the following two documents:
 - a. Fully executed purchase and sale agreement within the defined LIFT geography
 - b. Pre-approval from a NeighborhoodLIFT approved lender
3. Click the “Next” button.

LIFT Quiz

Do you have a signed purchase and sales agreement on a home located in the LIFT Geography? *

Yes



Do you have a mortgage pre-approval from an approved NeighborhoodLIFT lender? *

Yes



Next

LIFT Quiz

Center

Contact Us

My Profile

Sign

LIFT

STEPS

Have a signed contract and a pre-approval from a LIFT lender? Take the

Completing the LIFT Form

1. You will be taken to another screen where you will fill out the following fields:
 - a. Borrower First Name
 - b. Borrower Last Name
 - c. Co-Borrower First Name (if applicable)
 - d. Co-Borrower Last Name (if applicable)
 - e. Current Mailing Address including city, state and zip code.
 - f. Purchase Property Information including address, city, state and zip code.
 - g. Sales Price
 - h. Closing Date
 - i. Under the first responder, military, teacher information, check any and all that apply.
2. Hit the “Next” button to continue.

Excellent! To start the process for NeighborhoodLIFT® assistance, we will need to collect the following information from you, if you haven't already provided it:

Personal Info

Buyer First Name *

LIFT

Buyer Last Name *

Customer

Co-buyer First Name (if applicable)

Co-buyer Last Name (if applicable)

Mailing Address

Street Address *

Apt #

City *

State/Province *

--None--

Postal Code *

Postal Code *

Purchase Property

Street Address *

City *

State/Province *

--None--



Postal Code *

Sales Price *

Estimated Closing Date *

mm/dd/yyyy

[5/25/2018]

First Responder/Military/Teacher Information

- Choose any radio button that applies to you.
- For example, if you are a teacher, you would choose the radio button near teacher.

First Responder/Military/Teacher Info

Are you a veteran?

☐ Yes ☒ No

Are you active military?

☐ Yes ☒ No

Are you the surviving spouse of military?

☐ Yes ☐ No

Are you a first responder?

☐ Yes ☒ No

Are you a teacher?

☐ Yes ☒ No

Next

Uploading Documents

1. You will be taken to another screen where you will be able to upload documents. This is called the “My Documents” section of your account.
2. At this point you should upload the following documents:
 - a. Fully executed purchase and sale agreement
 - b. Pre-approval from a NeighborhoodLIFT approved lender
3. Click on the “Choose File” button.

[Dashboard](#)[My Documents](#)[Resources](#)[Training Center](#)[Contact Us](#)[My Profile](#)[Sign Out](#)[English](#) ▼

Documents for LIFT Customer

If you have not done so already, please upload a copy of the **first page and the signature page only** of your executed purchase and sales agreement AND mortgage pre-approval document you received from your NeighborhoodLIFT® approved lender. **We do not need all pages of these two documents.**

If we do not receive these documents from you within 24 hours, your spot in the NeighborhoodLIFT® program will be released, and you will need to take the quiz again, assuming NeighborhoodLIFT® funding is still available.

If after following these steps you have difficulty uploading your required docs, please click on "Contact Us" and send us an email and we will call you and walk you through the steps. If you have not provided us your phone number via your Profile, please include it in the email.

Additionally, if you have already completed your Home Buyer Education course, please submit a copy of your certificate as well (note: successful completion of an 8-hour HBE course is required prior to closing on your new home).

Need to upload documents but don't have access to a scanner? Log into your account with your smartphone or tablet, and you can use your device's camera to take a picture of your documents to send them to us that way!

No file chosen

Maximum file size is 2 GB

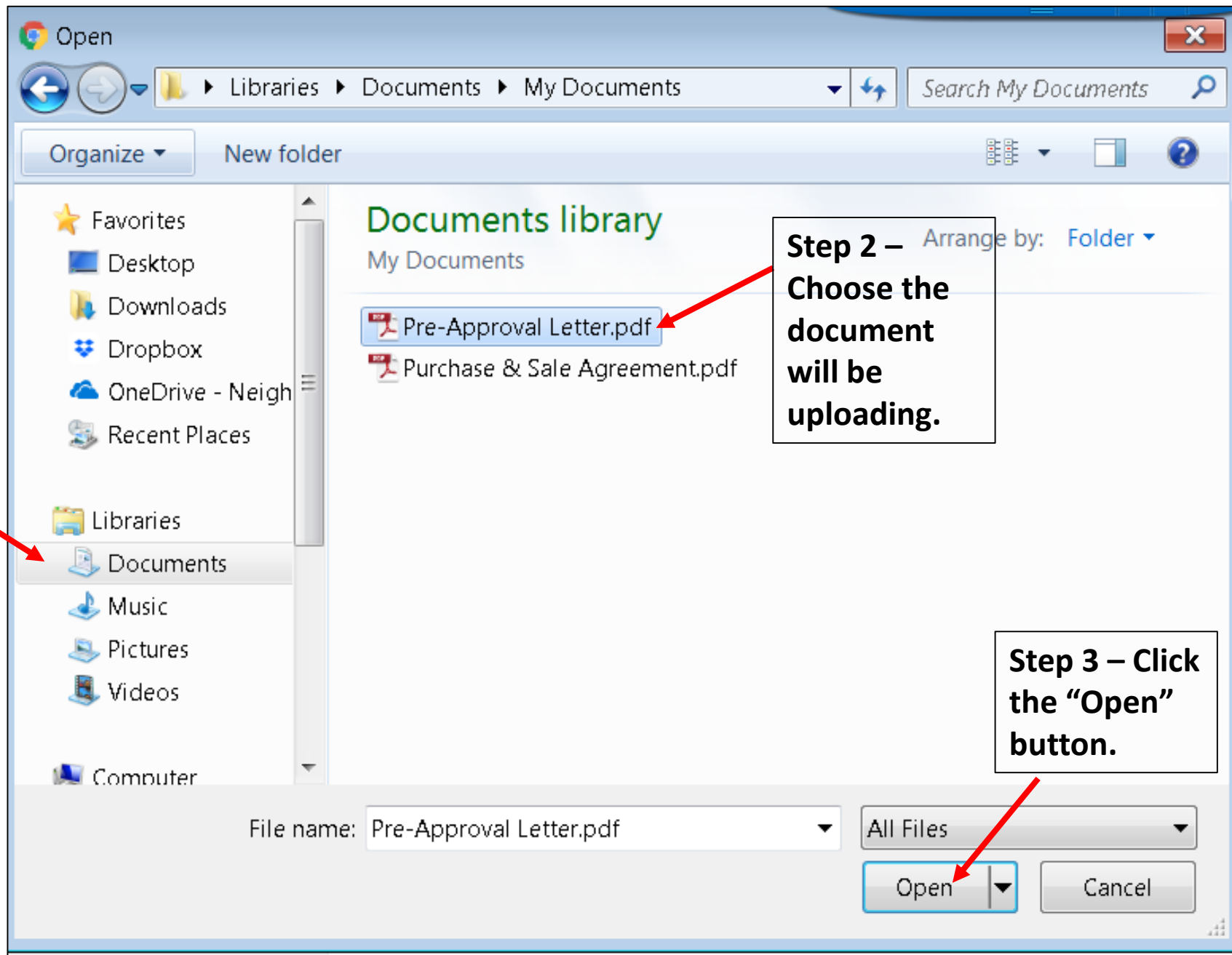
FILE UPLOAD - Allowed file types - doc, docx, ppt, pptx, pdf, jpg, png, xls, xlsx.

Please note that v152train2 CFT reserves the right to request re-uploads of any documents that are unclear.

Select Document Type

Uploading Documents

1. A screen will pop up on your computer for you to select the documents you will be uploading.
2. Go to the folder you have your documents saved on your computer and select the file one at a time.
3. Click the “Open” button.



Uploading Documents

1. The document you selected from your computer will be listed next to the “Upload” button.
2. Select the type of document you are uploading from the dropdown list.
3. Click the “Upload” button.



HOMEOWNERSHIP

1

Dashboard

My Documents

Resources

Training Center

Contact Us

My Profile

Sign Out

English ▼

If after following these steps you have already uploaded your required docs, please click on "Contact Us" and send us an email and we will call you and walk you through the steps. If you have not provided us your phone number via your Profile, please include it in the email.

Additionally, if you have already completed your Home Buyer Education course, please submit a copy of your certificate as well (note: successful completion of an 8-hour HBE course is required prior to closing on your new home).

Need to upload documents but don't have access to a scanner? Log into your account with your smartphone or tablet, and you can use your device's camera to take a picture of your documents to send them to us that way!

Choose File Pre-Approval Letter.pdf

Maximum file size is 2 GB

The name of the document you selected from your computer will appear here.

FILE UPLOAD - Allowed file types - doc, docx, ppt, pptx, pdf, jpg, png, xls, xlsx.

Please note that v152train2 CFT reserves the right to request re-uploads of any documents that are unclear.

Select Document Type

LIFT Pre-Approval Letter ▼

Click this arrow to choose the type of document you are uploading such as "LIFT Pre-Approval Letter" in this example.

Upload

When ready to upload your document click "Upload".


Uploading Documents

1. A box will pop up indicating your file is uploading. It may take some time to upload depending on your internet connection and the size of your file.
2. Repeat the document upload steps for the next document you need to upload.
3. You have now completed uploading your purchase and sale agreement and pre-approval letter.
4. In the next 48 business hours your documents will be reviewed. As soon as the documents have been verified, you will receive an email to login to your account and sign up for your Eligibility Determination Session.



Signing Up for an Appointment

1. Once you have received the email to sign up for your appointment, login to your account and click on the “Training Center” within your account.
2. Click the “Register” button under the NeighborhoodLIFT Eligibility Determination Session appointment.



1

Dashboard

My Documents

Resources

Training Center

Contact Us


My Profile

Sign Out

English

My Appointments


Classes and appointments we recommend, as well as those you have scheduled, appear under My Appointments. **v152train2 CFT has a no refund policy regarding all appointments, classes and workshops.** Appointments may be rescheduled once booked via the 'Reschedule' function for a scheduled appointment. If you register for a class or appointment, then find you are unable to attend and cannot find an available date to reschedule, please [Contact Us](#).



NeighborhoodLIFT® Eligibility Determination Session

You will not be able to schedule your Eligibility Session until you pass the LIFT quiz (link above) and submit your signed purchase agreement and mortgage pre-approval from your lender

Register



Signing Up for an Appointment

1. When you click register, a new window will pop up, where you will be able to select the location of your appointment. Please be sure to choose the correct location.
2. Click the Any Available provider option on the next screen. By choosing any provider you will be given the option to choose any appointment that is available at the location you selected.
3. Select the date and time of the appointment that works best for you. Be sure to remember that you must complete your Eligibility Session at least 21 calendar days prior to your closing date.

Locations

Find Location Find 25 miles

NWA DC Office

NWA New York Office

NWA DC Office
999 North Capitol Street NE, Washington, District of Columbia 20001

Schedule

6 SSL Secure About

Google

Appointment booking by: **setster**

Step 1 - Choose the location you prefer. Make sure it is within your LIFT geography!

Step 2 – Click “Schedule”.

Step 3 - Choose a provider. It is best to choose the option “Any Available” so you can choose an appointment that fits your schedule best. All appointments available at the location selected will display when this is chosen.

Locations Providers

Select a Service Provider

Any available

The provider will be automatically selected for you

Kara Tracey
Lender
005n0000002S52IAAC

Sarah Bentley
Counselor
005n0000002S52CAAS

Locations
Providers
Schedule

Select the day and time for your appointment

<
June 2018
>

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Friday June 1, 2018

AM

PM

8:00 am
1:00 pm

9:00 am
2:00 pm

10:00 am
3:00 pm

11:00 am
4:00 pm

5:00 pm

View [weekly](#) schedule.

All times are in EDT (GMT-04:00), [click to change](#).

6 SSL Secure About

Appointment booking by: [setster](#)

Step 4 - Choose the date that works best for you.
Remember your appointment must be completed 21 calendar days prior to closing! Keep that in mind when scheduling!

Step 5 - Choose the time that works best for you.

Step 6 – Click the Submit button.

Locations
Providers
Schedule
Submit

Please Complete Details

Date: Friday, June 1, 2018
Time: 4:00 pm - 5:00 pm EDT (GMT-04:00)
Location: NWA DC Office
Service: NeighborhoodLIFT® Eligibility Determination Session
Provider: Any available

Name: LIFT Customer
Email: liftcustomer@yopmail.com
Email: liftcustomer@yopmail.com
Notes: notes or special request


Submit

6 SSL Secure About

Appointment booking by: [sets33](#)

Signing Up for an Appointment

1. A screen will pop up letting you know your request was successful.
2. In your Training Center in your account you will be able to see that your appointment has been booked.
3. If you need to reschedule your appointment for any reason, go to your Training Center and click “Reschedule” and follow the Signing Up for Appointment instructions again.



DashboardMy Documents1ResourcesTraining CenterContact UsMy ProfileSign OutEnglish

My Appointments

Classes and appointments we recommend, as well as those you have scheduled, appear under My Appointments. **v152train2 CFT has a no refund policy regarding all appointments, classes and workshops.** Appointments may be rescheduled once booked via the 'Reschedule' function for a scheduled appointment. If you register for a class or appointment, then find you are unable to attend and cannot find an available date to reschedule, please [Contact Us](#).

JUN
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NeighborhoodLIFT® Eligibility Determination Session 06/01/2018
You will not be able to schedule your Eligibility Session until you pass the LIFT quiz (link above) and submit your signed purchase agreement and mortgage pre-approval from your lender / NWA DC Office / 4:00 PM

BOOKEDReschedule

This screen shows a Booked appointment. If you need to reschedule do that by click the “Reschedule” button.



Documents for Eligibility Determination Session

1. Once you have booked your Eligibility Determination Session appointment, you will receive an email confirming the date, time and location of that appointment.
2. Attached to the email confirmation will be a list of documents that you **MUST** upload at least 72 hours prior to your appointment time.
3. To upload the documents go back to the “My Documents” section of your account and follow the “Uploading Documents” section of this guide.