

# VALERI Special Announcement

**January 31, 2020**

The VALERI application will be unavailable on Friday, January 31, 2020, from 9:00 PM EST until 11:59 PM EST for a system deployment. All users must log out of the system by 8:45 PM EST.

The deployment will include the following items:

- Updates to servicer roles and permissions:
  - 1. Servicer Company Administrator (new role)**
    - View Loan Information
    - View and Upload Documents
    - View Salesforce Reports
    - View Analytics Reports (if license assigned)
    - View Announcements in the Servicer Web Portal (new functionality)
    - Administer User Access
    - Manage Analytics Licenses (new functionality)
    - Manage Department Contact Information
  - 2. Servicer Administrator**
    - View Loan Information
    - View and Upload Documents
    - View Salesforce Reports
    - View Analytics Reports (if license assigned)
    - Report Events
    - Upload Claims
    - File Appeals
    - File Supplemental Claims
    - Administer User Access - Servicer User and Read Only User
    - Assign the Servicer Company Admin Role
    - Manage Analytics Licenses (new functionality)
    - Manage Department Contact Information
  - 3. Servicer User**
    - View Loan Information
    - View and Upload Documents
    - View Salesforce Reports
    - View Analytics Reports (if license assigned)
    - Report Events
    - Upload Claims
    - File Appeals
    - File Supplemental Claims
  - 4. Read Only Servicer**
    - View Loan Information
    - View Documents
    - View Salesforce Reports
    - View Analytics Reports (if license assigned)

- Version 20.0 of the Event and Claim Bulk Upload Templates (v20) are located at [https://www.benefits.va.gov/HOMELOANS/servicers\\_valeri\\_guides.asp](https://www.benefits.va.gov/HOMELOANS/servicers_valeri_guides.asp). Updates to the templates include:
  - The 'Documentation' tabs on the Event and Claims templates provide guidance to better assist in completing the expense and event tabs.
  - If the data field is a required field to generate the event, the column header is green. If it is not required to generate the event, it is blue.
  - Formatting of fields, such as the date format, was corrected to avoid the templates from failing when submitted through the Servicer Web Portal.

Version 20.0 templates are effective as of Saturday, February 1, 2020. Servicers must continue to use the current versions (v19.1) through January 31, 2020.

- Correct assignment of VA loan technician to a loan when there is a successfully processed Electronic Default Notice event.
- Correct event non-matching logic to check that all four matching criteria are present: VA Loan Number, Loan Origination Amount (+/- \$5,000 variance threshold), Loan Origination Date (+/- 14-day variance threshold), and Property State.
- Report Error Message Workaround: The Claim Details Results and Events with Fatal Error reports generate data based on "All" or "All Time" in the "Case Completion Date" and "Event Submitted" filters, respectively. Until further notice, some users will continue to encounter an error message if the filter is changed.
- New reports (**Servicers**):
  - Appeal Post Audit Claim Detail Results
  - Post Audit and Appeal Post Audit Summary
- New reports (**Internal VA Only**):
  - Foreclosure Attorney Contact Information
  - RLC Dashboard VALERI Timeliness Processes
  - RLC Completed Cases by Step and Date
  - Post Audit Cases Monthly

All inquiries should be directed to the VALERI Technical team at [VALERI.VBACO@VA.GOV](mailto:VALERI.VBACO@VA.GOV).

Thank you for your cooperation.