

# VALERI

Release 10.0

## External Release Notification



*Version 1.0*

**April 2021**

**Department of Veterans Affairs**

**Office of Information and Technology**

**1.0 Release Notes for VALERI – VALERI 10.0**

## Release Notification

**From:** VALERI

**Version:** 10.0

**Production Deployment Date:** April 29, 2021 @ 8:00PM CT/9:00PM ET

**Focus of Release:** VALERI (VA Loan Electronic Reporting Interface) Release 10.0 will enable additional functionality, leveraging Salesforce Documents (SDOCs), will allow end users to export claims data from VALERI or the Servicer Web Portal (SWP) in a way that is easy to consume and analyze. Other changes include high value operational reporting enhancements and bug fixes.

The April release will provide immediate value to Veterans. Additionally, through improved reporting and workflow enhancements, technicians and servicers are better positioned to support Veterans efficiently and accurately.

### 1.1 Enhancements

Key	Component	Summary
LM-4683	Reports	This enhancement created a new “Department of Veteran’s Affairs (VA) Purchase Consideration” report (located in the VALERI Servicer Operational Reports and the VALERI Central Office Reports folder) providing a list of loans being considered for a VA Purchase.
LM-4727	Reports	This enhancement created a new “VA Purchase Consideration” report located in the SWP Analytics Reports tab, providing a list of all loans that a consideration was made for a VA Purchase.
LM-4024	Reports	This enhancement adds a new “Post Audit Incentive Results” report for servicers in the SWP, which displays the outcome of certified post audit incentives.
LM-4048	Reports	This report enhancement will now allow users to generate the “Salesforce / Bill of Collection Status and Offset” report in VALERI in the following directories: VALERI Servicer Operational Report, Automated Loan Accounting Center (ALAC), and Servicer Operational Report.
LM-4687	Reports	This enhancement created a new report called “Events Submitted by Different Servicer” which will identify a list of events that were submitted by a servicer other than the assigned servicer on the loan.
LM-21733	SF	Servicers will now see the “Pre-Approval” screen automatically refresh with the correct status after submitting a Pre-Approval request.

LM-22139	SF	Servicers can now view all their certified claims on a new screen in the SWP called "Claims". This screen allows users to search and filter claims, navigate to the loan for a claim, and export a claim in Portable Digital File (PDF) format.
LM-20905	SF	This enhancement updates the "User Administration" screen in the SWP and adds a count showing licenses used vs. how many are available.
LM-22051	SF	This enhancement allows "Loan Notes" to be exported into Excel, Word, or PDF.
LM-22401	SF	This enhancement limits the number of characters that can be added in a single loan note and also adds a character counter to allow the user to view the number of characters used and available when placing a loan note in VALERI.
LM-22817	SF	This enhancement is to systematically update the available servicer licenses when a user with a particular license is deactivated by a servicer admin in the SWP.
LM-22860, LM-24380	SF	This enhancement replaces the previous Admin screen with a new streamlined Admin Screen layout in the SWP that consolidates the functionality to approve/deny pending requests and edit/deactivate users in the same modal, thus removing a few extra clicks to complete the same functionality.
LM-22905	SF	This enhancement adds a "Claims Hub" in the SWP that shows all certified claims on the loan.
LM-22908	SF	This enhancement allows the certified basic claim to be exported from the "All Claims" screen and the Claims Hub within the SWP.
LM-24178	SF	Servicer Users will now be able to access a Service Now link within the SWP, so they can be redirected to the Service Now site for logging help desk tickets. This link can be found by navigating to the top menu bar in the SWP and select the "More" dropdown, then select a link called "HelpDesk Inquiry item".
LM-24373	SF	This enhancement updated the font used in the Servicer Web Portal from 'Georgia' to 'Salesforce Sans'.
LM-21887	SOA	This enhancement updates the documentation to match the cell format needed for each section and updates "Payee ID" and "Payee Loan Number" to "Servicer ID" and "Servicer Loan Number", respectively.
LM-23519	SOA	This enhancement updates California foreclosure configuration to be a confirmation state.
LM-24299	SOA / Documentation	This enhancement removes the "Payment Deferral" event from the bulk event upload spreadsheet.

## 1.2 Bugs

Key	Component	Summary
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LM-23221	SF	The Servicing Officer (SO) and Loan Administration Officer (LAO) users were prevented from uploading excel files and events. Users will now be able to upload claims and events templates on VALERI. Servicer Users will now be able to upload claims and events templates on the SWP.
LM-23985	SF	The counter function for licenses has been updated and now updates when a SWP Admin edits or assigns a servicer license to eliminate the need for the SWP Admin to refresh the screen to view the updates.
LM-23047	SF	Servicer licenses and permission sets are now systematically updated when a Servicer Admin deactivates a user in the SWP to resolve licensees and permissions not being updated upon deactivation.
LM-23114	SF	When clicking the column headers under "Manage Documents" on the "Documents" tab of a loan, the table did not sort by columns but will now be sorted by those columns.
LM-23978	SF	Automated web page now refreshes upon license assignment edit, replacing the need to manually refresh a page in order to see accurate updates.
LM-24631	SF	The "Claims" filter in the SWP has been updated and will now display results with 100 records per page as default instead of 10 records.
LM-317404	SF	The filter reset function affecting number of records per page displayed are now corrected to match the correct number of records displayed. This fix will also correct the "From / To" date filter to ensure when claim certified date is equals to the To date and the search results do not include the claims.
LM-317407	SF	The Admin tab will not appear for non-Servicer Admin or Servicer Company Admin users.
LM-18865	SOA / Documentation	This fix reduces processing time for users by reducing the bulk upload formatting down to only 1,000 rows.

## Annex

### Revision History

Date	Version	Description	Author
4/20/2021	1.0	Initial	Beth Ann VanVleet

**Acronyms:**

- ALAC - Automated Loan Accounting Center
- LAO – Loan Administration Officer
- LGY – Loan Guaranty Service
- NED – National Emergency Declaration
- PDF – Portable Digital File
- PRA – Paperwork Reduction Act
- SF – Salesforce
- SO – Servicing Officer
- SWP – Servicer Web Portal
- VA – Department of Veterans Affairs
- VALERI - VA Electronic Reporting Interface