Welcome what's next

CITI CORRESPONDENT LENDING

ANNOUNCEMENT

System Transition Update

Over the last few months, Citi Correspondent Lending has been migrating Correspondent lenders to our new technology platform and working to clear existing pipeline on the retiring system. We'd like to sincerely thank our lenders for their patience and cooperation as we worked through this transition. This accomplishment is a significant and critical step forward on our path to continuously improve the client experience.

We know there's still work to do. With the migration complete, our focus now turns to leveraging this new technology to shorten review times and streamline processes to improve overall purchase turn times. Your feedback has been a critical component in developing our post-system transition path and we're excited about making meaningful progress over the next few months.

Please review the critical updates outlined below and share with appropriate staff.

Retirement of the legacy Correspondent website and Agentsite - The Correspondent website - correspondent.citimortgage.com, and Agentsite - agentsite.com/solutions/, will be retired the weekend of June 18, 2021. These websites will not be accessible once this process has been completed.

Reference Documents and Reports - All current reference documents/reporting are being moved from the above retiring websites over to the **Correspondent Lending Portal under the Resources section** on or before Monday, June 21, 2021. The summary below reflects where you'll find this information posted:

- **Additional Resources tab** – This is a large section that's been further divided into the following tabs.
    - Training – Here you'll find current Quality Best Practices, Portal Job Aid, Portal Admin User Guide, CRA premiums and eligibility information, Life of Loan documents and more.
    - Communication – Recent announcements will be posted here.
    - Lender Profile – Outstanding trailing document and pay history reports, billing statements and scorecards will begin posting here, according to their regular cycles, as of Monday, June 14, 2021.
- **Support tab –** The Correspondent Contact List, approved project lists for condos and co-ops and the ineligible appraiser and originator lists are all posted here.

Note: Historical data for loans purchased in the legacy system will be available by request. Please contact your Client Services Consultant if this information is needed.

CRA Pipeline Scrubs – A geocoding tool will be available soon on the new Correspondent Lending Portal. In the interim, Citi can help you determine Best Efforts CRA premium eligibility of your existing pipeline. Send a spreadsheet containing your pipeline data in secure format to corr.crascrub@citi.com. The required data template is posted under Resources/Additional Resources/Training.

Rate Sheets

Rate sheets will continue to be distributed via email and will be posted on the Correspondent Lending Portal in the very near future. Please contact your Client Services Consultant to be added to a distribution list.

Citi Correspondent Lending Announcement

Submission of Trailing Documents

- **If the loan was purchased from the retiring Correspondent Website,** documents can be uploaded to the Citi SFT site, https://securefiletransfer.citigroup.com/, through 7/31/2021.
- **If the loan was purchased from the new Correspondent Lending Portal,** upload documents directly to the loan. Search for the loan, hover over it so that it's highlighted, and click on the Manage button. Select the Doc Manager tab, select Misc. as the document type from the Upload pick list, drag/drop or browse for file(s), and click on the Deliver button to complete the upload.

  OR

- **Email option for loans purchased on either technology platform; documents MUST be sent in a secure format:**
  - **Pay histories:** correspondentimaging@citi.com
  - **All other trailing documents:** document.response.team@citi.com

We want to take this opportunity once more to express our sincere thanks for your partnership, patience and, most importantly, your feedback during this transition period.

Please reach out to your Account Executive/Client Services Consultant team with any questions, concerns, or comments.