

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 Cass, Clay or Jackson counties.

Steps for Borrower

Follow these steps if you attended the launch event on July 27th or 28th. If you did not attend the event, proceed to page/slide 5.

1. Visit <https://beyondhousing.force.com/beyondhousingcft/>. Sign in to your account using the email address you provided at the launch event.
2. You received an email from Beyond Housing the day your account was created at the event to confirm your account and set up your password.
3. If you cannot remember your password, please click the “Forgot Password” link.

If you have an account,
click here to sign in.

[Resources](#)

[Training Center](#)

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[Sign In](#)

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Welcome!

The path to owning your own home
just got a whole lot easier.

[Sign Up Now](#)



When it comes to deciding who to work with when you are in the market for a new home, NeighborWorks® Columbus 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?

Steps for Borrower

Follow these steps if you need to create an account.

1. Visit <https://beyondhousing.force.com/beyondhousingcft/>.
2. Click the “Sign Up Now” button.
3. You will receive an email from Beyond Housing to confirm your account and set up your password.
4. Click the link in the email you receive to Confirm your account.
Once your account is confirmed follow the steps outlined beginning on page/slide 8.

[Resources](#)

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Your User Name & Password

Email address*

Password*

**Step 3 - Click
login.**

Log In

[Forgot Password?](#)

Don't have an account? [Create Account](#)

**Step 1 - Enter email address
you provided at launch
event.**

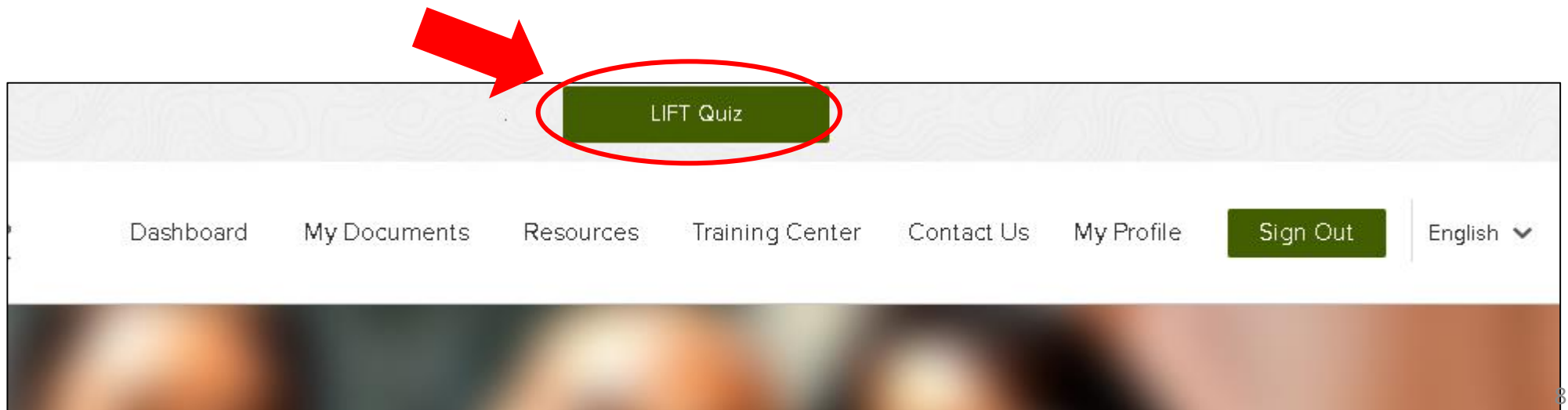
**Step 2 - Enter password you
created when confirming
your account.**

**Forgot password? Click
“Forgot Password” and you
will be able to reset your
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.

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

Do you like Ice cream?

☐ 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!

Choose File No file chosen

Maximum file size is 2 GB

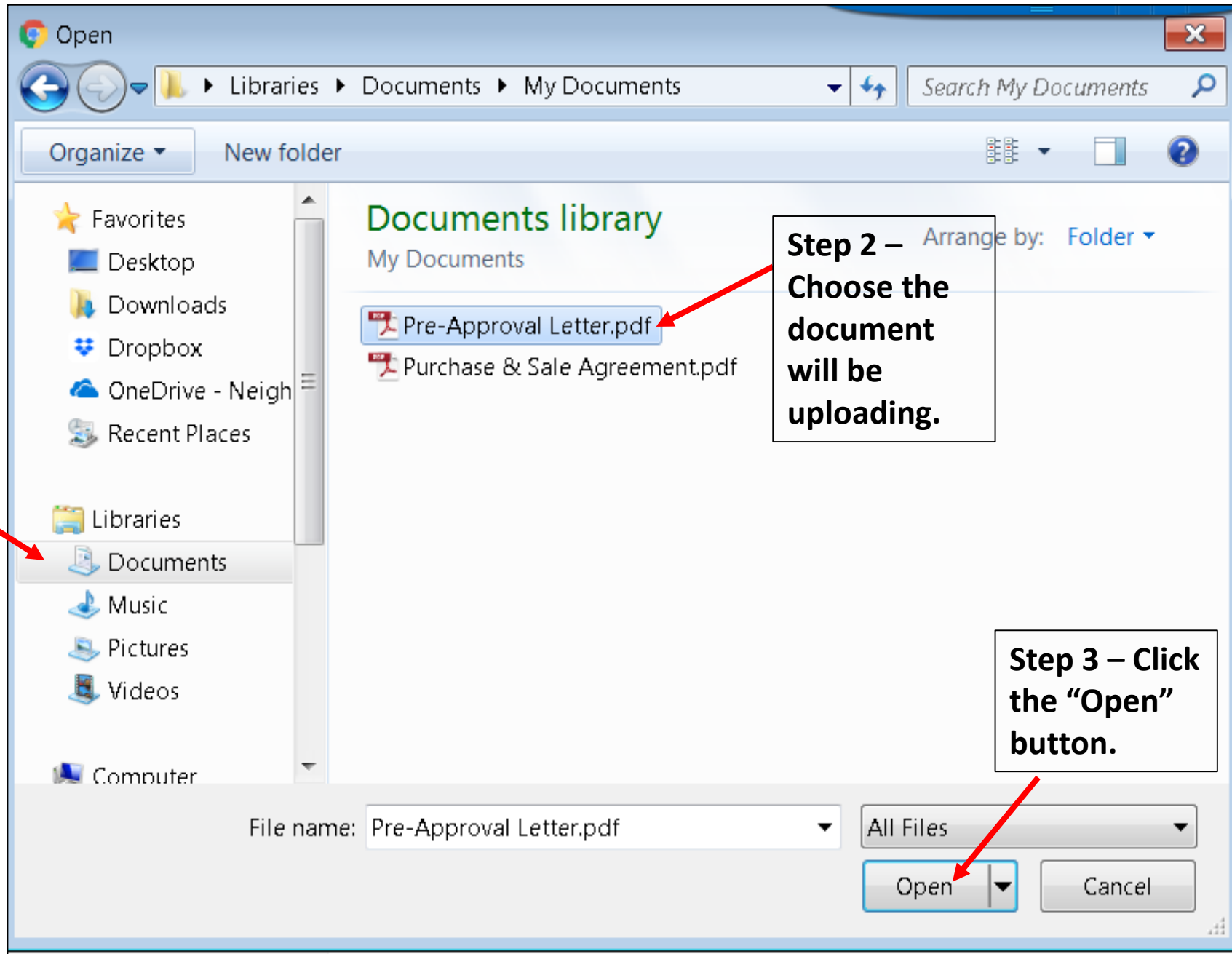
FILE UPLOAD - Allowed file types - doc, docx, ppt, pptx, pdf, jpg, png, xls, xlsx.

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

Dashboard

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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.



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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
>

SU	MO	TU	WE	TH	FR	SA
27	28	29	30	31	1	
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

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: [sets26](#)

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 1

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

BOOKED

Reschedule

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.