Contents

Online NAID Application Process ................................................................. 1
Registering for the NAID Portal If You Don’t Have a NAID ....................... 2
   Step 1 – Request access to the NAID Portal If You Don’t Have a NAID .... 2
   Step 2 – NAID Portal Registration Prescreening ................................. 6
      HUD Review of Registration Prescreening ........................................ 6
   Step 3 – Completing the NAID Portal Registration Process ................. 8
Registering for the NAID Portal If You Already Have a NAID .................. 9
   Step 1 – Request Access to the NAID Portal ..................................... 9
   Step 2 – Completing the NAID Portal Registration Process ............... 14
Adding a New NAID for a New Payee ....................................................... 16
   Step 1 – Completing the Application for a New NAID ....................... 16
      Entering the NAID Application Information .................................... 17
      Upload Required Documentation ..................................................... 17
      Tax ID Number (TIN) Checking ....................................................... 19
      If your application is rejected.......................................................... 19
   Step 2 – E-Signature/NAID Creation ................................................. 20
      E-Signature Signing Ceremony ....................................................... 21
Modify Existing Payee (NAID) ............................................................ 23
   Updating Information on the NAID .................................................... 23
      Updating the NAID Information on the NAID Application screen ... 24
      Requirements for Address Changes ................................................ 24
Adding New NAID to an Existing Payee .................................................. 26
   Step 1 – Completing the Application for the New NAID .................... 26
      Entering the NAID Application Information .................................... 28
      Upload Required Documentation ..................................................... 28
      If your application is rejected.......................................................... 30
   Step 2 – E-Signature/NAID Creation ................................................. 31
      E-Signature Signing Ceremony ....................................................... 32
Manage User Access ............................................................................ 34
   Set up new users .............................................................................. 35
   Managing Existing Users .................................................................. 36
Vendor Management (for HUD Users) ...................................................... 37
   NAID Creation ............................................................................... 37
   NAID Approval .............................................................................. 37
   NAID Application Tab ..................................................................... 37
Add/Remove Contract Areas ................................................................. 37
Deactivate NAID ................................................................................. 38
Update Vendor Screen ...................................................................... 39
Update Payee Types ......................................................................... 40
Go To TINCheck .............................................................................. 41
Add Contacts .................................................................................. 41
NAID Application Tab ...................................................................... 41
Vendor Status History Tab ................................................................. 42
Online NAID Application Process

HUD now has an online NAID (Name and Address Identifier) process. NAIDs are required for any Nonprofits and Government Agencies that want to be paid by HUD. NAIDs are also required for Nonprofits and Government Agencies that wish to place bids on the HUD Homestore website.

This is a four-step process:

Working with a NAID is a four-step process:

1. Prescreening so you can access the NAID Portal. The steps will differ depending on whether you have a NAID or not.
2. Creating a password for the NAID Portal. The username for the account is the applicant’s email address.
   Note: This is a login that is separate from a bidding account you may create on HUDHomestore.gov.
3. Filling in an online NAID Application form and submitting the application and supporting documents online.
4. After HUD performs a preliminary review, there is an e-Signature process to complete the application.

The new process includes:

- A Workflow checklist that guides you through the entire process
- Electronic Signatures after a preliminary review
- When applying for a new NAID: After HUD performs a preliminary review, a pending NAID is created so the applicant can register and bid on HUD Homestore. After the E-Signature process has been fully processed, the NAID is fully activated and can be used to ratify HUD contracts.

First, you’ll need to register for access to the NAID Portal.

If you are applying for a new NAID, go to Registering for the NAID Portal If You Don’t Have a NAID on page 2.

If you already have a NAID, go to Registering for the NAID Portal If You Already Have a NAID on page 9.
Registering for the NAID Portal If You Don’t Have a NAID

Step 1 – Request access to the NAID Portal If You Don’t Have a NAID

Prospective NAID Applicants request access to the NAID Portal by doing the following:

Start at HUDHomestore.gov

On the Home screen, just below the menu bar, locate the red text that says “Principal Brokers and HUD-Approved Nonprofits only: Click here to apply for a NAID....”

Click the word here to display the first message indicating you will be going to the NAID Application Portal.

Click OK to display the HUD Legal Notice.

Click Accept to display the NAID Application Portal list of actions.
Select “Register Nonprofit or Local/State Government for access to the NAID Portal”.

Select “I am applying for a new NAID”.

Registering for the NAID Portal If You Don’t Have a NAID
Registering for the NAID Portal If You Don’t Have a NAID

Enter (and confirm) your email address.

Choose your Vendor Type.

If you are experiencing problems, please try using Google Chrome or MS Edge before contacting the FHA Resource Center at (855) CALL-FHA (225-53142).
Applicants are required to supply the following information:

- **Agency Name and Agency Address**
  - The Agency Address is where 1099s will be mailed to. If this is not the physical location of the business, you will need to supply that information during the application process.

- **Contact Name, Title, and Phone Number**
  - The Contact is the person responsible for filling out the NAID Application
  - The email address previously entered ensures the contact receives emails including the E-Signature Application required to create a NAID.

- **EIN (Employer Identification Number) and EIN Confirmation**
  - This is a unique nine-digit number that identifies your business for tax purposes.
Registering for the NAID Portal If You Don’t Have a NAID

- For Nonprofits, provide a copy of your IRS Ruling/Determination Letter and a copy of your HUD Nonprofit Approval Letter

Note: Accepted file types are doc, docx, pdf, png, and jpg. Documents that are encrypted or password-protected will be rejected.

After supplying the above information, select the “I’m not a robot” check box which validates the application is being submitted by a person.

Click the **REGISTER** button. If that button is not available, check to see if you have missed an entry in one of the fields.

You have the option to click **BACK** to verify the information.

When you click **REGISTER**, the following message displays:

```
Verify Before Submitting
Please verify all information before submitting your registration. Once submitted, details cannot be edited until after HUD approval. If you need to correct or revisit any provided information, please return to the form before submitting.
```

Click **SUBMIT** to send the registration for HUD review and approval, or click **RETURN** to go back to the application and make changes before submitting.

**Step 2 – NAID Portal Registration Prescreening**

**HUD Review of Registration Prescreening**

The Applicant receives a message stating that their access to the NAID Portal requires HUD approval.

![Register for Access to NAID Application Portal](image)

**Prescreening Submitted**

Prescreening successfully submitted to HUD for approval. Once your request is approved, you will receive an email with instructions on how to set up your login for the NAID Application Portal account.

If you have not received this email, please check your junk email for do-not-reply@HUDP260.com. In order to avoid the email being categorized as spam, please add do-not-reply@HUDP260.com to your list of acceptable emails.

You can now close this window while you await the prescreening email.
HUD Registration Approval

If HUD staff approves your registration request, you will receive an email telling you how to complete your registration and begin your online NAID Application.

NAID Portal Registration Authenticated by HUD

do-not-reply_HUDP260@yardi.com

to [email address]

Hello [Name].

Your request to access the NAID Portal has been accepted.

Click [HERE](mailto:do-not-reply_HUDP260@yardi.com) to create your password for the NAID Portal. Make sure to remember the email address you used and the password you created - your next login may be many months from now and, if you forget your password, the system will require the email address you used to provide a temporary passcode so you can log in.

Once logged into the portal you will be able to apply for a NAID, view or modify your NAID information and if you registered with an EIN add a new NAID.

To apply for a NAID you will need to provide the following:

1. DBA name and address
2. Contact name, email, and phone number
3. Internal Revenue Service (IRS) documentation showing business name/individual name and your Tax Identification Number (TIN)

After submitting the application, HUD will review the application. Once the application is approved and you sign the electronic signature document, another email will be sent with your pending NAID. This NAID can be used immediately to register on HUD Homestore and submit bids.

If you have issues with registration, please contact the FHA Resource Center at (800) CALL FHA (225-5342).

If HUD staff rejects the registration request, you will receive an email with the reason(s) for the rejection. You can then submit a new application with the correct information and uploads.
Step 3 – Completing the NAID Portal Registration Process

In the approval email, click the blue HERE link to display the screen where you create and confirm a password. Although the mobile number is optional, it could be used in the future for two-factor authentication as added security on an account. The username is always the email address that was entered during Step 1.

![Create NAID Portal Login](image)

After the information is entered, click the SUBMIT button to access to the NAID Portal website and begin the NAID application. You will see the following options:

Select one of the following options

- Add New Payee (Add New NAID Application)
- Grant Access to NAID Portal

Experiencing Issues?
We try our best to support as many web browsers as possible. If you are experiencing any difficulties throughout the NAID Application process, please consider using Google Chrome or Microsoft Edge as your web browser before contacting our Help Desk.

Select “Add New Payee (Add New NAID Application)”.
Go to Adding a New NAID for a New Payee on page 16.
Registering for the NAID Portal If You Already Have a NAID

Step 1 – Request Access to the NAID Portal

Nonprofits and Government Agencies require access to the NAID Portal if they have a NAID and need to update information or create a new NAID.

Start at HUDHomestore.gov.

On the Home screen, just below the menu bar, locate the red text that says “Principal Brokers and HUD-Approved Nonprofits only: Click here to apply for a NAID....”

Click the word here to display the first message indicating you will be going to the NAID Application Portal.

Click OK to display the HUD Legal Notice.

Click Accept to display the NAID Application Portal list of actions.
Registering for the NAID Portal If You Already Have a NAID

Select “Register Nonprofit or Local/State Government for access to the NAID Portal”.

Select “I already have an existing NAID”.

Select “I already have an existing NAID”.

Registering for the NAID Portal If You Already Have a NAID

Enter your NAID and click the SUBMIT button.

If the NAID is valid, go to the next page.

If the NAID is inactive or not found, the following message appears:

An Error Occurred
The NAID entered was not found in our system.

Click CLOSE.

To double-check the NAID number:
(1) Return to the initial NAID Application Portal List of Actions (go back to Step 1)
(2) Select “Find NAID and Check Application Status”.
(3) Select the Business option, then enter your EIN number and click SUBMIT. The system will display the NAID(s) linked to that EIN number.
(4) If you can’t find a NAID number linked to that EIN number, then you will need to submit a request for a new NAID (go to Registering for the NAID Portal If You Don’t Have a NAID on page 2). You can also see if that NAID might have been linked to a different tax ID.
If the NAID is valid, the Register for Access to NAID Application Portal screen appears.

After supplying the above information, click the “I’m not a robot” check box which validates that the form is being submitted by a person.

Review the information, then click the **REGISTER** button.

A message appears letting you know that the information in the application cannot be changed until after HUD Approval.
Verify Before Submitting

Please verify all information before submitting your registration. Once submitted, details cannot be edited until after HUD approval. If you need to correct or revisit any provided information, please return to the form before submitting.

Click **SUBMIT** to complete the prescreening and send it to HUD or click **RETURN** to review the information before resubmitting.

If your prescreening is successful, you will see the screen on the next page.
Step 2 – Completing the NAID Portal Registration Process

After HUD staff approves your prescreening, you will receive an email telling you how to complete your registration.

In the approval email, click the blue HERE link to display the screen where you create and confirm a password.

Your request to access the NAID Portal has been accepted.

Click HERE to create your password for the NAID Portal. Make sure to remember the email address you used and the password you created - your next login may be many months from now and, if you forget your password, the system will require the email address you used to provide a temporary passcode so you can log in.

Once logged into the portal you will be able to view or modify your NAID information and if you registered with an EIN add a new NAID.

If you have issues with registration, please contact the FHA Resource Center at (800) CALL-FHA (225-5342).

In the approval email, click the blue HERE link to display the screen where you create and confirm a password.
Registering for the NAID Portal If You Already Have a NAID

Although the mobile number is optional, it could be used in the future for two-factor authentication as added security on an account.

After the information is entered and the **SUBMIT** button is clicked, you gain access to the NAID Portal website and can select one of the following options:

**Select one of the following options**

- Add New NAID to Existing Payee (EIN)
- Add New Payee (New EIN)
- Manage NAID Portal Users

**Experiencing Issues?**

We try our best to support as many web browsers as possible. If you are experiencing any difficulties throughout the NAID Application process, please consider using Google Chrome or Microsoft Edge as your web browser before contacting our Help Desk.
Adding a New NAID for a New Payee

Step 1 – Completing the Application for a New NAID

Log into the NAID Portal and click the “Add New Payee (Add New NAID Application)” button to display the NAID Application screen.
Adding a New NAID for a New Payee

Entering the NAID Application Information

Applicants are required to enter the following information before submitting to HUD for review:

- **Business (1099) Address** – the address is pre-populated using the address entered by the applicant during the prescreening process. This address can be updated and it can be a PO Box or a street address.

- **Remittance (Physical) Address** – This is typically the Doing Business As (DBA) name and address. PO Boxes are not permitted. If it’s the same as the Business Address, click the **Copy Name and Address from Business Info** button to copy the information from the Business Name and Business Address.

- **Contact Information** – Enter the name, telephone number, and email address of the contact person.

- **Minority-Owned Code** – If the company is not minority-owned, select “Not Minority”; otherwise select the type by using the dropdown arrow to see the list.

- **Name(s) of Owner(s)/Principal(s)** – Enter the name of the Owner(s)/Principals(s).

- **Family/External Business Relationship to HUD/M& Contract employees?** – Select “Yes” if there is a relationship with any HUD/M&M Contract employee. If “Yes,” a description of the relationship is required. If there is no relationship, select “No.”

- **Financial Institution (Nonprofits only)** – Enter or select the bank where electronic funds will be sent. HUD will notify you if this is required.

- **Account Number (Nonprofits only)** – Enter the bank account number where electronic funds will be sent. HUD will notify you if this is required.

- **Application Status, Preparer’s Title** – Enter the title for the preparer.

Once the information is added, scroll down to the bottom and, on the left side, click the **Save and Continue Working on the Application** button. A message displays with information about what to do next.

Click **OK**. The form is saved, and a message appears on the screen asking the applicant to upload any required documentation.

**Upload Required Documentation**

Clicking the **Upload Required Documents** displays a screen which tells the applicant which documents are required to complete the application. Nonprofits and Government Agencies are required to submit the following documents:

- **IRS Documentation** – Document showing Business Name (EIN) and Tax Identification Number (TIN). Examples include IRS Form 147C, Tax Return with preprinted label, or IRS payment coupon. State issued forms are not acceptable.

- **(Nonprofits Only)** – A copy of the IRS Ruling/Determination Letter and the HUD Nonprofit Approval Letter were previously uploaded, but if they need to be updated, you can click the **Replace Document** button.
**Note:** Allowable document types are those with .pdf, .doc, .docx, .jpg, or .png file extensions. Files may not be encrypted or password-protected.

Note: An additional document—an SF-3881 ACH Vendor/Misc Payment Enrollment Form—may be required if HUD asks you to fill in the Financial Institution portion of the NAID Application form.

Once you click **Save** and the required documents are uploaded, the Upload Required NAID documents window closes and the application is complete and ready to submit to HUD for review.

Click the **Save and Submit Application to HUD for Review** button, a message appears.
Click **OK** to submit the application to HUD or click **Cancel** to review the application and submit it to HUD at a later time.

**Tax ID Number (TIN) Checking**

Once the NAID application is submitted, the Business/Individual Name and TIN (EIN) entered by the applicant is verified against an IRS site.

If the Name and TIN matches the IRS information, the application is sent to HUD staff for review. If the Name and TIN cannot be found on the IRS website, the application is returned to the applicant to correct the Business/Individual or TIN (SSN/EIN). If the application could not be authenticated due to connection or other issues, HUD staff will manually TIN Check the SSN/EIN. HUD staff will also review each of the uploaded documents.

**If your application is rejected**

If your application is rejected, you have the opportunity to make changes and resubmit the application for approval. If corrections are needed on the form, you can make the changes and then resubmit for review.

If one or more of the forms are rejected, you can view the uploaded documents and see which ones were rejected and review HUD’s comments. You can then delete and re-upload the documents and resubmit the application to HUD for review.
Step 2 – E-Signature/NAID Creation

After the HUD Review is completed, the E-Signature process begins. Within the email, E-Signature recipients view an “Envelope” which contains a SAMS-1111 form and the required documents that were uploaded during the application process.

Note: Do not forward this email. If you do, you will not be able to review and sign the document. It must be opened directly from the email address it was sent to.

Three parties are required to sign the application:

- The Nonprofit or Government Agency applicant that submitted the application
- The HUD Reviewer who will sign the SAMS-1111
- The HUD Approver who will sign the SAMS-1111

After the HUD review is complete, the E-Signature process begins. The E-Signature recipients receive an email where they view an “Envelope” which contains a SAMS-1111 form and the required documents that were uploaded during the application process.
E-Signature Signing Ceremony

To sign the envelope, recipients click the **REVIEW DOCUMENTS** button within the email.

Click the check box agreeing to use electronic records and signatures.

Then click the **CONTINUE** button to begin the e-signing process. Clicking the **START** button shows the recipient where to sign. To sign, click the **Sign** button.
You will be asked to adopt a style for your name, initials, and signature. Click the Change Style link if you would like a different writing style.

To adopt a style, click the **ADOPT AND SIGN** button.

Once all signatures have been completed, click **FINISH**.

You can then close the document. You are not required to create a DocuSign account.

**HUD Reviewer Signs—Pending NAID Created**

After you and the HUD Reviewer sign the document, the following occurs:

- A “Pending” NAID is created which permits the Nonprofit/Government Agency to register as a bidder on HUDHomestore.gov and place bids on properties.
- You receive an email with the Pending NAID number along with instructions for registering and placing bids on HUD Homestore.

**HUD Approver Signs—NAID Becomes Active**

The final step in the NAID Application process is the HUD Approver signature. After the HUD Approver signs the document, the following occurs:

- The “Pending” NAID becomes an “Active” NAID.
- A PDF copy of the completed envelope with signatures displays as an attachment on the NAID Application screen.
- NAID holders have the option to modify NAID information.

**Decline to Sign**

Email recipients may wish to not sign the envelope. This will void the envelope and any “Pending” NAID becomes “Inactive” which would result in the Nonprofit or Government Agency no longer being able to place bids on HUDHomestore.gov.

If you decide to not sign the envelope, click **Decline to Sign** within the document and select.

**Envelope Expiration**

Envelopes expire 20 days after creation. If an Envelope expires after a “Pending” NAID is created, the NAID is set to “Inactive.”
Modify Existing Payee (NAID)

Updating Information on the NAID

To update information on an existing NAID, select [Modify Existing Payee]

[NAID Application Screen]

Type of Application
- Add New Payee (New NAID)
- Modify Existing Payee (NAID)
- Add New NAID to Existing Payee (EIN)
- Real Estate Broker Recertification

Payee Information
- EIN: 27-0000000
- Payee Existing NAID: [Insert Payee ID]
- NAID Status: Active

Business Address (1099-MISC sent here)
- Street Address: [Insert Address]
- City: [Insert City]
- State, Zip+4: [Insert State, Zip]
- Business Phone Number: (805) [Insert Phone Number]

Remittance Address (DBA) (Physical Address - No PO Boxes)
- Copy Name and Address from Business Info

Contact Information
- Name of Contact Person: [Insert Name]
- Contact Email: [Insert Email]
- Phone: (805) [Insert Phone Number]
- Fax:

Additional Information
- Minority-Owned Code: Not Minority
- Small Business Owned: [Select Yes or No]
- Owner(s)/Principal(s): [Insert Name(s) or Principal(s)]
- Woman Owned: [Select Yes or No]
- Family/External Business Relationship to HUD/MHM Contract employees?: Yes

Financial Institution Information (HUD will notify you if this is required)
- Account Number: [Insert Account Number]
- Confirm Account Number: [Insert Confirm Account Number]
- Institution Name: [Insert Institution Name]
- Street Address: [Insert Street Address]
- City:
- State, Zip+4: [Insert State, Zip]

Application Status
- Application Number: 113782
- Application Status Date: 06/29/2018
- Preparer's Name: [Insert Name]
- Preparer's Title: [Insert Title]
- Preparer's Phone Number: (805) [Insert Phone Number]

This information enables HUD to record and process financial transactions in its automated SAMS to dispose of acquired single-family properties. HUD reimburses MHH

Updating the NAID Information on the NAID Application screen

Depending upon the information updated, HUD may require updated documentation. The table below lists the requirements based upon the changes:

<table>
<thead>
<tr>
<th>Updated Field</th>
<th>Required Document(s) and/or Updates</th>
<th>HUD Review Required?</th>
<th>New E-Signature Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business (1099) Address</td>
<td>Copy of IRS Documentation</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Business Phone Number</td>
<td>N/A</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Remittance Name</td>
<td>N/A</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Remittance Address</td>
<td>Copy of recent Telephone Bill, Utility Bill or Bank Statement</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Contact Name, Email Address, or Phone Number</td>
<td>N/A</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Name(s) of Owner(s)/Principal(s)</td>
<td>N/A</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

Requirements for Address Changes

If the Business (1099) Address or the Remittance Address changes, the user receives a message asking them to upload required documents.

Users then click the [Upload Required Documents](#) link to review which documents need to be uploaded.
Once any changes are saved and, if needed, required documents are uploaded, the application is ready to submit.

Click the **Save and Submit Application to HUD for Review** button. A message appears giving the option to click **OK** to submit the application to HUD or click **Cancel** to review the application and submit to HUD at a later time.

If HUD staff rejects any of the updated form data or the uploaded documentation, you will receive an email with the reason(s) for rejection. You then have the opportunity to go back into the NAID Portal and fix what’s needed.
Adding New NAID to an Existing Payee

Step 1 – Completing the Application for the New NAID

The Add New NAID to Existing Payee function is used when there are multiple locations for a nonprofit or government agency. After clicking the button, the NAID Selection screen appears. Click the option and click CONFIRM on the next screen.

The NAID Application screen appears with information populated from the existing NAID including:

- EIN
- Business Name
- Business Address
- Preparer’s Name and information

The applicant is required to supply the following information for the new Payee (NAID):

- Remittance Name and Address
- Contact Name, Email Address and Phone Number
- Name of Owner(s)/Principal(s)
- Preparer’s Title
Once the information is added and the form is saved, a message appears asking the applicant to upload the required documentation.
Adding New NAID to an Existing Payee

Entering the NAID Application Information

Applicants are required to enter the following information before submitting to HUD for review:

- **Business (1099) Address** – the address is pre-populated using the address entered by the applicant during the prescreening process. This address can be updated and it can be a PO Box or a street address.

- **Remittance (Physical) Address** – This is typically the Doing Business As (DBA) name and address. PO Boxes are not permitted. If it’s the same as the Business Address, click the Copy Name and Address from Business Info button to copy the information from the Business Name and Business Address.

- **Contact Information** – Enter the name, telephone number, and email address of the contact person.

- **Name(s) of Owner(s)/Principal(s)** – Enter the name of the Owner(s)/Principals(s).

- **Family/External Business Relationship to HUD/M& Contract employees?** – Select “Yes” if there is a relationship with any HUD/M&M Contract employee. If “Yes,” a description of the relationship is required. If there is no relationship, select “No.”

- **Financial Institution (Nonprofits only)** – Enter or select the bank where electronic funds will be sent. HUD will notify you if this is required.

- **Account Number (Nonprofits only)** – Enter the bank account number where electronic funds will be sent. HUD will notify you if this is required.

- **Application Status, Preparer’s Title** – Enter the title for the preparer.

Once the information is added, scroll down to the bottom and, on the left side, click the Save and Continue Working on the Application button. A message displays with information about what to do next.

Click OK. The form is saved, and a message appears on the screen asking the applicant to upload any required documentation.

Upload Required Documentation

Clicking the Upload Required Documents displays a screen which tells the applicant which documents are required to complete the application. Nonprofits and Government Agencies are required to submit the following documents:

- **IRS Documentation** – Document showing Business Name (EIN) and Tax Identification Number (TIN). Examples include IRS Form 147C, Tax Return with preprinted label, or IRS payment coupon. State issued forms are not acceptable.

- **(Nonprofits Only)** – A copy of the IRS Ruling/Determination Letter and the HUD Nonprofit Approval Letter were previously uploaded, but if they need to be updated, you can click the Replace Document button.
**Note:** Allowable document types are those with .pdf, .doc, .docx, .jpg, or .png file extensions. Files may not be encrypted or password-protected.

Note: An additional document—an SF-3881 ACH Vendor/Misc Payment Enrollment Form—may be required if HUD asks you to fill in the Financial Institution portion of the NAID Application form.

Once you click **Save** and the required documents are uploaded, the Upload Required NAID documents window closes and the application is complete and ready to submit to HUD for review.

Click the **Save and Submit Application to HUD for Review** button, a message appears.
Click **OK** to submit the application to HUD or click **Cancel** to review the application and submit it to HUD at a later time.

**If your application is rejected**

If your application is rejected, you have the opportunity to make changes and resubmit the application for approval. If corrections are needed on the form, you can make the changes and then resubmit for review.

If one or more of the forms are rejected, you can view the uploaded documents and see which ones were rejected and review HUD’s comments. You can then delete and re-upload the documents and resubmit the application to HUD for review.
Step 2 – E-Signature/NAID Creation

After the HUD Review is completed, the E-Signature process begins. Within the email, E-Signature recipients view an “Envelope” which contains a SAMS-1111 form and the required documents that were uploaded during the application process.

Note: Do not forward this email. If you do, you will not be able to review and sign the document. It must be opened directly from the email address it was sent to.

Three parties are required to sign the application:

- The Nonprofit or Government Agency applicant that submitted the application
- The HUD Reviewer who will sign the SAMS-1111
- The HUD Approver who will sign the SAMS-1111

After the HUD review is complete, the E-Signature process begins. The E-Signature recipients receive an email where they view an “Envelope” which contains a SAMS-1111 form and the required documents that were uploaded during the application process.
E-Signature Signing Ceremony

To sign the envelope, recipients click the [REVIEW DOCUMENTS] button within the email.

Click the check box agreeing to use electronic records and signatures.

Then click the [CONTINUE] button to begin the e-signing process. Clicking the [START] button shows the recipient where to sign. To sign, click the [Sign] button.
You will be asked to adopt a style for your name, initials, and signature. Click the Change Style link if you would like a different writing style.

To adopt a style, click the **ADOPT AND SIGN** button.

Once all signatures have been completed, click **FINISH**.

You can then close the document. You are not required to create a DocuSign account.

**HUD Reviewer Signs—Pending NAID Created**

After you and the HUD Reviewer sign the document, the following occurs:

- A “Pending” NAID is created which permits the Nonprofit/Government Agency to register as a bidder on HUDHomestore.gov and place bids on properties.
- You receive an email with the Pending NAID number along with instructions for registering and placing bids on HUD Homestore.

**HUD Approver Signs—NAID Becomes Active**

The final step in the NAID Application process is the HUD Approver signature. After the HUD Approver signs the document, the following occurs:

- The “Pending” NAID becomes an “Active” NAID.
- A PDF copy of the completed envelope with signatures displays as an attachment on the NAID Application screen.
- NAID holders have the option to modify NAID information.

**Decline to Sign**

Email recipients may wish to *not* sign the envelope. This will void the envelope and any “Pending” NAID becomes “Inactive” which would result in the Nonprofit or Government Agency no longer being able to place bids on HUDHomestore.gov.

If you decide to not sign the envelope, click **OTHER ACTIONS** within the document and select **Decline to Sign**.

**Envelope Expiration**

Envelopes expire 20 days after creation. If an Envelope expires after a “Pending” NAID is created, the NAID is set to “Inactive.”
Manage User Access

Once a NAID is created, the applicant manages who has access to the NAID Portal and can add users, inactivate users, or reactivate users.

To access the screen, go to the NAID Application menu and select NAID Application > NAID User Setup.

Or, at the Options screen, the user can select Manage NAID Portal Users.

The empty fields at the top allow you to search for users who have access to the NAID Portal. The first row of empty blue fields is where you can add a user.

The NAID User Setup screen allows for the following:

- Set up new users
- View existing users and manage access to the NAID Portal

Note: The user who is logged in will not be able to see themselves on this list. Their account is active, and they do not need to add themselves to the list to gain access to the NAID Portal.
Set up new users

The following is required when setting up new users:

- **Group**
  - **NAID Group** – Access to application for updates and recertifications. This group can see one or more NAIDs.
  - **NAID2 Group** – Admin account with ability to manage user access as well as access to the NAID Portal for updates and recertification. This group can potentially see all NAIDs associated with one or more EINs/SSNs.

- **First Name/Last Name** – Enter the name of the user who will be accessing the NAID Portal.

- **Email** – Enter the email address. This email will be the username for the new user and must be correct or the user will not receive an email inviting them to register.
  **Note:** The user stays inactive until they respond to the email and complete their registration by selecting a password. Here’s a sample of the email that’s sent inviting the new user to register:

  ![Email Invitation Sample](embedded-image)

- **Phone Number** – Enter the phone number for the user.

- **Add/Remove NAIDs** – If you are linked to multiple NAIDs based upon your EIN/SSN, you will be able to select which NAIDs the new user has access to. Click the [Add/Remove NAIDs](#) link which is available after the new user is saved.
Manage User Access

- Select the Add check box to add a single NAID for this user. Select the Delete check box to remove access to a single NAID for this user. With multiple NAIDs, select the Add All check box to assign the entire group of NAIDs to the user or select Delete All to remove access to all NAIDs for the user.

- Click the Save button.

Managing Existing Users

After a user is added:

- The user’s information can be updated except for their email address if they have registered.
- The user may have all NAID access stopped.
- NAIDs may be added or removed.
Vendor Management (for HUD Users)

The following Vendor Management functions were added to the P260 Vendor Screen:

- NAID Application tab
- Add/Remove Contract Areas
- Deactivate NAID
- Update Vendor Screen
- Update Payee Types
- Go to TINCheck
- Add Contacts
- Vendor Status History

NAID Creation

After the application is e-signed by the applicant and the HUD reviewer, the NAID is created with the following information:

- Status – set to “Pending” which allows bids to be placed; however, the property cannot close until NAID status is set to “Active”
- Status Date – date the NAID was created
- Stop Payment Flag – set to “Yes”
- 1099 Applicable – set to “Yes”
- Form Received Date – date the form is submitted by the applicant to HUD
- Form Approval Date – date the form is approved by HUD
- Form Entered Date – date the pending NAID is created
- Vendor Status History will reflect C-Created status

NAID Approval

After the HUD Approver signs the application, the NAID is activated with the following information:

- Status – set to “Active”
- Status Date – date the NAID was approved
- Vendor Status History will reflect S-Status change

NAID Application Tab

Tab allows drill-down to the NAID Application to view the history of NAID creation, modifications, and recertifications.

Add/Remove Contract Areas

Clicking the function Add/Remove Contract Areas allows HUD staff to modify the Contract Areas the NAID is tied to.

Users have the option of Adding or Deleting Contract Areas by selecting the appropriate checkbox.
Deactivate NAID

Clicking the function **Deactivate Vendor** allows HUD staff to inactivate a NAID.

Users are required to do the following on the screen:

- Set Deactivate NAID to "Yes"
- Choose the Deactivate Reason from the following list:
  - DN = Duplicate NAID
  - EC = Expired Contract
  - EF = Earnest Money Receivable Due
  - GN = General Deactivation
  - LD = LDP (Limited)
  - NI = Not Interested in HUD Program
  - NT = New TIN
  - PD = PDP (Permanent)
  - SB = Selling Broker Recert Expired (Not applicable for Nonprofits)
  - TN = Invalid IRS Matching
  - TX = IRS Tax Levy
  - VI = Vendor Inactivity - Annual
- Enter Comments
A NAID cannot be deactivated if it is linked to an active transmittal. Once you click Save and the NAID is deactivated, it is recorded as S-Status in the Status History.

**Update Vendor Screen**

Clicking the [Update Vendor Screen](#) link allows HUD staff to modify the following information on the Vendor Screen:

- Business Name
- Business Address
- Remittance Name
- Remittance Address
- Remittance ATTN

HUD staff selects the field they wish to change from the Field dropdown.

Once the field is selected from the dropdown, users will see the current value and have the ability to enter a new value.
The following processes occur when these fields are updated:

- **Business Name update**
  - The Vendor Status is set to “N-Business Name”
  - An automatic TIN Check determines if the Business Name and EIN matches IRS information

- **Business Address update**
  - The Vendor Status is set to “A-Address”

- **Remittance Name update**
  - The Vendor Status is set to “M-Remittance Name”

- **Remittance Address update**
  - The Vendor Status is set to “R-Remittance Address”

### Update Payee Types

Clicking the [Update Payee Types](#) link allows HUD staff to update the Payee Types. Users have the option to select a new Payee Type.

Once the Payee Type is updated, the Status History will be updated to “P-Payee Type.”
Go To TINCheck

Clicking the Go To TINCheck link opens the TINCheck Payee Verification System website where the TIN (EIN) can be verified.

Add Contacts

An Add Contacts link lets HUD staff add contacts for the nonprofit to the Vendor record.

NAID Application Tab

A NAID Applications tab is available which lets HUD staff drill down to see the history of the application including the original application and modifications.
Vendor Status History Tab

The Vendor Status History tab is updated with the following statuses as changes are made to a NAID.

- **C (Created)** – Added when the “Pending” NAID is created
- **S (Status Updated)** – Added when the status is changed from “Pending” to “Active” or when there is a deactivation or reactivation of the NAID
- **N (Business Name)** – Added when the Business (1099) Name is updated
- **M (Remittance Name)** – Added when the Remittance (DBA) Name is updated
- **A (Address)** – Added when there is a change to the Business (1099) Address
- **R (Remittance Address)** – Added when there is a change to the Remittance (DBA) Address
- **P (Payee Type)** – Added when Payee Types are added or removed

<table>
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<th>Status</th>
<th>Status Date</th>
<th>Previous Value</th>
<th>New Value</th>
<th>Comments</th>
<th>Created By</th>
<th>Name</th>
<th>Phone Number</th>
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<tr>
<td>S-Status</td>
<td>10/14/2022</td>
<td>Pending</td>
<td>Active</td>
<td>NAID set to Active Status</td>
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<tr>
<td>C-Created</td>
<td>10/13/2022</td>
<td>[ ]</td>
<td>NAID created with Pending Status</td>
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