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 ................................. 7
    HUD Review of Registration Prescreening ...................................... 8
  Step 3 – Completing the NAID Portal Registration Process ............... 10
Registering for the NAID Portal If You Already Have a NAID .................. 12
  Step 1 – Request Access to the NAID Portal ...................................... 12
  Step 2 – Completing the NAID Portal Registration Process ............. 17
Adding a New NAID for a New Payee ...................................................... 20
  Step 1 – Completing the NAID Application for a New NAID ............ 20
    Step 2 – E-Signature/NAID Creation ............................................ 24
      E-Signature Signing Ceremony .................................................. 25
Password Reset and Account Recovery If Email Address Has Changed ....... 28
  Password Reset .............................................................................. 28
  Account Recovery If Email Address Has Changed .............................. 31
Selling Broker—Recertification ............................................................... 36
  Step 1 – Log into the NAID Portal .................................................... 36
  Step 2 – Select Selling Broker Recertification .................................. 39
  Step 3 – Make any needed updates and uploads ................................ 40
    If there are no updates .................................................................. 41
    If you need to update your license expiration date ........................... 41
    If you need to change your license number or another state license ... 42
    If you need to update the Business Address (1099) and/or the Remittance Address (DBA) ... 42
    Updating the NAID Information on the NAID Application screen ...... 43
  Step 4 – Submit the Application ....................................................... 44
    If the HUD Staff Rejects the NAID Recertification Application ...... 44
Selling Broker—Modify Existing Payee (NAID) ........................................... 45
  Password Reset .............................................................................. 45
  Account Recovery If Your Email Address Has Changed ...................... 49
  Step 1 – Updating Information on the NAID .................................... 53
    Updating the NAID Information on the NAID Application screen .... 56
    Requirements for Address changes .............................................. 56
    If you need to update your license expiration date ......................... 57
    Requirements for Changing a License Number or Adding a new Real Estate License ... 57
    If the HUD Staff Rejects the Modified NAID Application ............ 58
Online NAID Application Process

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

Selling Broker recertification is required on a yearly basis and is done online.

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 broker’s email address.  
   Note: This is a login that is separate from a broker bidding account you may have on HUDHomestore.gov.
3. Filling in (or making changes to) the NAID Application screen and submitting the application and supporting documents online.
4. After HUD performs a preliminary review, there may be an e-Signature process to complete the application.

The process includes:

- A Workflow checklist that guides the applicants through the entire process.
- Electronic Signatures (for new NAIDs or a change in broker) after preliminary review.
- When applying for a new NAID: After HUD performs a preliminary review, a pending NAID is created as soon as the Principal Broker signs the DocuSign. At that point, the Principal Broker can register with the pending NAID and bid on HUD Homestore. Agents can also register on HUD Homestore with that NAID. After the E-Signature process has been fully processed, the NAID is fully activated and can be used to ratify HUD contracts.

If you already have access to the NAID Portal, and need to

- Add a new Payee (create a new NAID), go to page 20.
- Recertify your NAID, go to page 28.
- Modify your NAID information, go to page 45.
- Manage users for the NAID Portal, go to page 60.

If you need to create a first-time login for the NAID Portal, you’ll need to do a prescreening.

- If you are applying for a new NAID, go to page 2.
- If you already have a NAID, go to page 12.
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.
Registering for the NAID Portal If You Don’t Have a NAID

Select “Register for Principal Selling Broker access to the NAID Portal”.

Select “I am a Principal Broker applying for a new NAID”.

Select “I am a Principal Broker applying for a new NAID”.
Enter (and confirm) your Principal Selling Broker email address.
Applicants must supply the following information:

- Register using a Business tax ID number (EIN) or a Social Security number (SSN)
  - If the business uses an EIN (Employer ID) number (###-#######), select the Business tax ID number (EIN) option.
  - If the business uses a Social Security number (SSN), select the Social Security number (SSN) option.
- Provide the Principal Selling Broker’s first and last name
- If the business is EIN-based, enter the Business Name.
Registering for the NAID Portal If You Don’t Have a NAID

- Business Address
  - Provide the Business Address where 1099-MISC forms will be mailed to. This can be a PO Box.
  - **Note:** A Physical Address (which may be different from the Business Address) is added during the application process. The Physical Address is typically the Doing Business As (DBA) name and address. PO Boxes are **not** permitted for the Physical Address.

- Principal Broker Email Address
  - The email address previously entered is already on this form. If it’s not correct, click the Back button to make your correction and then resubmit.
  - A valid email address ensures the Principal Broker receives emails including the E-Signature Application required to create a NAID.

- Principal Broker Phone Number
  - Enter the phone number for the Principal Broker.

- Principal Broker Real Estate License Number, License State, License Issue Date (optional), License Expiration Date
  - The Principal Broker License Number is used to verify whether the Principal Broker is licensed to do business in the state they are requesting access for. **This is the personal license for the Principal Broker, not the corporate license for the business.**
  - **Note:** Be sure to include all letters, punctuation, and numbers on the license.
  - After the prescreening application is submitted, the Principal Broker License Number is checked against an online site to verify the information.
  - If the Principal Broker is licensed in multiple states, those additional state licenses can be added after the NAID is created.
  - The broker’s license must have a future expiration date to submit the application. If the license that’s uploaded has an Expiration Date that is in the past, HUD will not approve access to the NAID Portal, and you will need to resubmit the application.

- EIN (or SSN) number and confirmation
  - Enter the complete EIN or SSN number twice.

- Copy of Broker’s Real Estate License
  - Use the “Choose File” button to upload a copy of the Principal Broker’s Real Estate License. That uploaded license is used to verify the license number and expiration date entered on the application.
  - **Note 1:** Be sure to upload the personal license for the broker. HUD will reject applications where the corporate license has been uploaded.
  - **Note 2:** Allowable document types are those with .pdf, .doc, .docx, .jpg, or .png file extensions. File names may contain spaces and underscores. Files cannot be encrypted or password protected.

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 or have entered a past date for the License Expiration Date.
A “Verify Before Submitting” message appears letting you know that the information in the application can’t be changed until after HUD Approval. Click Return to review or change the information before submitting or click Submit to send the prescreening application to HUD.

**Step 2 – NAID Portal Registration Prescreening**

After the request is submitted, the license is verified against an online license site. If the broker’s license can be automatically verified, you will receive an email with information on how to complete your registration and begin your online NAID Application.

**Note:** Not all states participate in the online license site. Those states or territories that cannot be automatically verified are IL, LA, MI, MN, NM, NY, PA, PR, VA, WA, and WI.

If the broker’s license is automatically verified, the following message appears:
HUD Review of Registration Prescreening

If the license cannot be automatically verified, you will see a message stating that your access to the NAID Portal requires HUD approval.
Once your registration request is approved, you will receive an email telling you how to complete your registration and begin your online NAID Application.

Hello [name],

Your request to access the NAID Portal has been accepted.

Click [HERE](http://example.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, recentify your NAID, 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)
4. A copy of the principal broker’s driver’s license.
5. A copy of the first page of a recent telephone bill, utility bill, or bank statement.
6. A copy of the principal broker’s state real estate broker’s license.

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 your registration request, you will receive an email with the reason(s) for the rejection.
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 for the broker that was entered during Step 1.

After the information is entered, click the SUBMIT button to access 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
- Change My Email Address

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.

If you wish to grant access to additional people to help maintain your NAID, click "Grant Access to NAID Portal."

Note that an email address change for the broker will also update the username for the broker and can only be accomplished using the "Change My Email Address" option.

To begin the NAID application, please go to Adding a New NAID for a New Payee (page 20).
Registering for the NAID Portal If You Already Have a NAID

Step 1 – Request Access to the NAID Portal

Selling Brokers who have a NAID will require access to the NAID Portal to update information, recertify, or add 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 for Principal Selling Broker access to the NAID Portal”.

Select the first option—“I am a Principal Broker with an existing 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 (or Individual) option, then enter your EIN (or SSN) number and click SUBMIT. The system will display the NAID(s) linked to that tax identification/SSN number.
4. If you can’t find a NAID number linked to that 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 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. Click **Return** to review the information before submitting or click **Submit** to complete the prescreening and send it to HUD.
After the form is submitted, the system will verify that the NAID, EIN/SSN, and the Principal Broker’s Email Address match the latest information stored in the system.

**Note:** If the Principal Broker never registered on HUD Homestore, there will not be a Principal Broker email stored there. The email being verified will be the Email Address for the broker that was entered on the SAMS-1111 form.

If the information is verified, the applicant will receive the following message:

If you are unable to register successfully, contact the FHA Resource Center at 800-225-5342 for assistance.
Step 2 – 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.

Hello,

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 apply for a NAID, view or modify your NAID information, recentify your NAID, 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)
4. A copy of the principal broker’s driver’s license.
5. A copy of the first page of a recent telephone bill, utility bill, or bank statement.
6. A copy of the principal broker’s state real estate broker’s license.

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 (222-5342).
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 for the broker that was entered during Step 1.

After the information is entered, click the **SUBMIT** button to access to the NAID Application Portal option menu.
Select one of the following options

- Selling Broker Recertification
- Add New NAID to Existing Payee (EIN)
- Add New Payee (New EIN)
- Modify Existing Payee
- Manage NAID Portal Users
- Change My Email Address

Experiencing Issues?

We try 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.

Note that an email address change for the broker will also update the username for the broker and can only be accomplished using the "Change My Email Address" option.
Adding a New NAID for a New Payee

Step 1 – Completing the NAID 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

NAID Portal User Guide for Selling Brokers

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, phone number, fax number (optional), and email address of the contact person.

- **Selling Broker Information** – The information that was provided during the prescreening process cannot be changed during the application process.

- **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(s) of the company’s owner(s) or principal(s).

- **Family/External Business Relationship to HUD/M&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’s no relationship, select “No.”

- **Small Business Owned** – Select if the company qualifies as a small business.

- **Woman Owned** – Select if the company qualifies as a woman-owned business.

Once the information is added and you click **Save and Continue Working on the Application**, an alert appears asking you to upload the required documentation.

Upload Required Documentation

Clicking the [Upload Required Documents] link (under the Functions dropdown at the top middle of the screen) displays a list of which documents are required to complete the application. Selling Brokers are required to submit the following documents:

- **IRS Documentation** – Document showing the Business Name/Individual Name and Tax Identification Number (TIN). For EINs, examples include a recent IRS 147C Letter or a Tax Return with preprinted label. For SSNs, the applicant needs to upload a copy of their signed Social Security Card. The address needs to match the Business Address.

- **Principal Broker’s Driver’s License**
• Copy of first page of recent (within the last 60 days) telephone bill, utility bill, or bank statement. For an EIN-based NAID, the first line of the address should be the company name; for an SSN-based NAID it can be the name of the principal broker. The address needs to match the Remittance/Physical Address.

• Copy of Principal Broker’s State Real Estate License – this was uploaded during the prescreening process and may be updated if it’s no longer current.

**Note:** Allowable document types are those with .pdf, .doc, .docx, .jpg, or .png file extensions. File names may contain spaces and underscores. Files cannot be encrypted or password protected.

Click **Select Document** to find each document and then click **Open**. Each document’s file name can contain only letters and numbers as well as spaces and underscores.

Once you click **Save** (in the upper left corner), the system uploads the required documents, and the application will be complete and ready to submit to HUD for review. On the NAID Application screen, to the right of the Save and Continue Working on the Application button, you will see a **Save and Submit Application to HUD for Review** button. Clicking that button displays a message letting you know that clicking OK “seals” your application, while clicking “Cancel” lets you review the application and submit it to HUD at a later time.
The NAID Application screen displays a workflow at the top of the screen indicating where you are in the process of securing a new NAID.

The Status History tab at the bottom of the screen indicates the present status of the application.

If the EIN/SSN cannot be automatically verified against the IRS TIN Matching Site, you will be given the opportunity to change the EIN/SSN number. If it is a correct number, then keep the number as it is. Click the button to resubmit the application to HUD.

If the Name and EIN/SSN combination cannot be authenticated by HUD’s manual review, you will be notified to correct the information.

HUD staff will then review your application and verify that NAID Application information was entered correctly, verify that the correct documents were uploaded, and select the NAID Approver who is responsible for final approval of the application.

If any of the uploaded documents are rejected, HUD staff will add a comment letting you know why the item was rejected. An email is sent with the reason(s) for rejection.

Resubmitting Rejected Applications

If the application is rejected, you have the opportunity to make changes and resubmit the application. If corrections are needed on the form, you can make the changes and then resubmit for review. If one or more of the uploaded documents are rejected, you will be able to view the documents and see which ones were rejected and review HUD’s comments. You can then re-upload the documents and then resubmit the application to HUD for review.
Step 2 – E-Signature/NAID Creation

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, a SAMS-1111-A 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.

If the application was submitted by the Principal Broker, the following signatures are required:

- **Principal Broker** – signs the SAMS-1111 and SAMS-1111-A
- **HUD Reviewer** – signs the SAMS-1111
- **HUD Approver** – signs the SAMS-1111

If the application was submitted by someone on behalf of the Principal Broker, the following signatures are required:

- **Preparer** – will sign the SAMS-1111
- **Principal Broker** – signs the SAMS-1111-A
- **HUD Reviewer** – signs the SAMS-1111
- **HUD Approver** – signs the SAMS-1111
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.
Adding a New NAID for a New Payee

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.

**Principal Broker Signature/Pending NAID Creation**

After the Principal Broker signs the document and clicks the **FINISH** button, the following occurs:

- A “Pending” NAID is created which lets the Selling Broker register a bidding account on HUD Homestore and place bids on properties (see Broker Registering as Bidder on HUDHomestore.gov on page 88).
- The Principal Broker receives an email with the NAID along with instructions for registering and placing bids on HUD Homestore. If someone else prepared the application, they will also receive a copy of this email.

   Hello [Principal Broker Name],

   The following is your “Pending” NAID: [NAID]

   Use this NAID to register on HUD Homestore. Once registered, you and your agents will be able to place bids on HUD properties.

   The principal broker must register first. Click the Bidder button on the top right corner of the HUDHomestore screen. Complete and submit the registration form. When the principal broker has registered, selling agents can register using the above NAID and their own real estate license numbers.

   You will receive another email when the E-Signature process has been fully processed. At that time, your NAID will be officially activated and ready to ratify HUD contracts.

- The HUD Reviewer responsible for reviewing the application receives the envelope to sign.

**HUD Approver Signature: NAID Activated**

After the HUD Reviewer signs the document, the envelope is sent to the HUD Approver for their signature. When the HUD Approver signs the document, the following occurs:

- The “Pending” NAID becomes an “Active” NAID.
- The Certification Date is set to the date the Approver signs and the Recertification Date will be the Certification Date plus 365 days.
- The Principal Broker receives an email indicating the NAID is now active. The email includes instructions for recertifying the NAID on a yearly basis. If someone else prepared the application, they will also receive a copy of this email.
- A PDF copy of the completed envelope with signatures is added as an attachment on the NAID Application screen.
Adding State Licenses and Modifying NAID Information

Now that the NAID is active, the applicant can modify the NAID information and add additional state licenses using the Add/Replace Real Estate License link in the Functions dropdown at the top (middle) of the NAID Application screen.
Password Reset and Account Recovery If Email Address Has Changed

Password Reset

To reset the password, click the Forgot Password? link to display the Account Recovery window.

Enter the email address for the account and click the Submit button.

Note: If you no longer have access to this account’s email address, see Account Recovery If Your Email Address Has Changed on page 31.
If there’s a match, the following message displays:

![Account Recovery](image)

Click the **ENTER TEMPORARY CODE** button and get set to enter the temporary passcode which expires 20 minutes after being sent. Check your email for the temporary passcode.

Here’s a sample of the Temporary Passcode email that is sent.

```
NAID Portal Password Reset

(\do-not-reply@HUDP260.com)
To: you (Ecc) + 1 more Details

Hello,

Your NAID Portal password reset code is: 473316
This temporary code will expire in 20 minutes.
Please navigate to the NAID Portal and enter this code to set a new password.

Note: This is an auto-generated mail. Please do not reply.
```

Note that you can click the [NAID Portal](#) link within the email to display the screen below where the temporary password is entered.
Enter the temporary passcode and click the **RESET PASSWORD** button to display the NAID Portal Change Password screen where you enter two copies of a new (never before used) password.

If the temporary passcode has expired, then click the **GENERATE A NEW TEMPORARY PASSCODE** button and return to your email to retrieve it.
Account Recovery If Email Address Has Changed

To recover your account if your email address has changed, click the **Forgot Password?** link to display the Account Recovery window.

Click the “I no longer have access to this email” link.
Password Reset and Account Recovery If Email Address Has Changed

Fill in the required information including the NAID, the EIN/SSN number, and the Principal Broker’s last name, then click **Submit**.

If the email change is successful, you’ll see the following message.
Click the **ENTER TEMPORARY CODE** button and get set to enter the temporary passcode which expires 20 minutes after being sent. Check your email for confirmation of the change and for the temporary passcode.

Here are samples of the two emails that are sent:
Password Reset and Account Recovery If Email Address Has Changed

Note that you can click the NAID Portal link within the above email to display the screen below where the temporary password is entered.

Enter the temporary passcode and click the RESET PASSWORD button to display the NAID Portal Change Password screen where you enter two copies of a new (never before used) password.

If the temporary passcode has expired, then click the GENERATE A NEW TEMPORARY PASSCODE button and return to your email to retrieve it.
Enter two copies of your new password and click **Submit**. You will be logged into the NAID Portal. **Note:** This change of email address has updated the account’s email address *and* the username on the account.
Selling Broker—Recertification

During the Recertification process, the Selling Broker is asked if the Business (1099) Address has changed. If so, they are required to update it and provide updated IRS documentation. Other information may be updated as well.

Once the information is updated (if there are any updates) and any needed documents are uploaded, the Recertification process is completed by clicking the “Save and Submit Application to HUD for Review” button. For a minor update, the Certification Date is immediately updated to the current date and the Recertification Date is set to the current date plus 365 days. When documents need to be reviewed by HUD, the process may take several business days to complete.

If the NAID Recertification Date is 90 days or less from today’s date and you need to update broker information, be sure to use Selling Broker Recertification, not Modify Existing Payee, to make the changes.

Step 1 – Log into the NAID Portal

If you need to register for access to the NAID Portal, please see Registering for the NAID Portal If You Already Have a NAID on page 12.

If you already have a login, 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 the action you wish to perform:

- Log In Now (Previously registered on NAID Portal)
- Register for Principal Selling Broker access to the NAID Portal
- Replace Principal Broker on NAID
- Remove your Real Estate License from NAID
- Find NAID and Check Application Status
- Check NAID Recertification and License Expiration Dates
- Register Nonprofit or Local/State Government for access to the NAID Portal

Select “Log in Now (Previously registered on NAID Portal)”. 

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**Legal Notice: U.S. Department of Housing and Urban Development**

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By clicking "Accept" below, Contractors certify any information entered into this system by the Contractor or their employees is true and accurate, to the best of their knowledge. Falsehood of information may result in civil and/or criminal penalties, as well as contractual remedies being sought.
Fill in the email address. To see the password as it’s being typed in, click the ⋋.
Step 2 – Select Selling Broker Recertification

Once you’re logged in, you’ll see a screen with the following options.

Select one of the following options

- Selling Broker Recertification
- Add New NAID to Existing Payee (EIN)
- Add New Payee (New EIN)
- Modify Existing Payee
- Manage NAID Portal Users
- Change My Email Address

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 Selling Broker Recertification. A message displays:

If your Recertification Date with HUD is close to due or past due
This application allows you to update:
- Yearly Recertification
- Business (1099) Address
- Remittance Address
- Office or Contact Information
- Real Estate Licenses
- Broker Information

Select Confirm to display the NAID Application screen.
Step 3 – Make any needed updates and uploads

Please review payer information, check the box under the Business Address to verify where the 1099 is to be sent, then click Save & Continue Working on the Application.

### NAID Application Screen

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Type</td>
<td>Real Estate Broker Recertification</td>
</tr>
<tr>
<td>Business Address (1099-MISC sent here)</td>
<td></td>
</tr>
<tr>
<td>This is the valid address where 1099s will be sent</td>
<td>Edition 1099: 2021 or 2022</td>
</tr>
<tr>
<td>Remittance Address (DBA) (Physical Address - No PO Boxes)</td>
<td>Remit Street Address:</td>
</tr>
<tr>
<td>Copy Name and Address from Business Info</td>
<td></td>
</tr>
<tr>
<td>Name of Contact Person*</td>
<td></td>
</tr>
<tr>
<td>Principal Broker’s Email</td>
<td></td>
</tr>
<tr>
<td>Principal Broker’s Phone #</td>
<td></td>
</tr>
<tr>
<td>Additional Information</td>
<td></td>
</tr>
<tr>
<td>Minority-Owned Code</td>
<td></td>
</tr>
<tr>
<td>Name(s) of Owner(s)/Principal(s)*</td>
<td></td>
</tr>
<tr>
<td>Family/External Business Relationship to HUD &amp; M&amp;M Contract employee</td>
<td></td>
</tr>
</tbody>
</table>

### Application Status

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Number</td>
<td>58891</td>
</tr>
<tr>
<td>Application Status Date</td>
<td>10/13/2022</td>
</tr>
<tr>
<td>Application Status Date Prepared</td>
<td>10/13/2022</td>
</tr>
<tr>
<td>Preparer’s Name</td>
<td></td>
</tr>
<tr>
<td>Preparer’s Title</td>
<td>PRINCIPAL BROKER</td>
</tr>
</tbody>
</table>

This information enables HUD to record and process financial transactions in its automated SAMS to dispose of acquired single-family properties. HUD reimburses M&M Contractors for their services in maintaining, marketing, and selling HUD homes, and HUD consults funds associated with the sales of these properties. The Information enables HUD to create and maintain sound financial management practices and effective internal controls over the property disposition program. A response is required to obtain or maintain a benefit.

Privacy Act Statement: The Department of Housing & Urban Development (HUD) is authorized to collect the information on this form by the U.S. Housing Act of 1937, as amended. The Housing and Community Development Act of 1987, 42 U.S.C. 3549, authorizes HUD to collect Social Security Numbers (SSN). The information is being used as Payee reference information. IRS 1099 applicability, minority data collection information, payment remittance instructions and proof of business viability. The SSN is used as a unique identifier. HUD may disclose this information to Federal, State and local agencies when relevant to civil, criminal, or regulatory investigations and proceedings. It will not be otherwise disclosed or released outside of HUD, except as required and permitted by law. Providing the SSN is mandatory. Failure to provide the information could result in a delay or rejection of your eligibility approval.
If there are no updates

In the Business Address area, review the 1099 Business Address, check the “This is the valid address where 1099s will be sent” check box.

Just below the two paragraphs at the bottom, click the “Save and Continue Working on the Application” button.

![Save and Continue Working on the Application](image)

Then click the [Save and Submit Application to HUD for Review](#) button which will appear to the right of the “Save and Continue…” button. A message appears giving you the option to click “OK” to submit the recertification application to HUD or click “Cancel” to review the application and submit it to HUD at a later time.

If you need to update your license expiration date

Click the Functions dropdown at the top (middle) of the screen; then select [Verify Real Estate Licenses](#) to display the Verify Real Estate Licenses screen.

![Verify Real Estate Licenses](image)

Enter the new expiration date. and select [Replace License](#) to find a copy of your new license, then click the Save button at the top left of the screen.

**Note:** Allowable document types are those with .pdf, .doc, .docx, .jpg, or .png file extensions. File names may contain spaces and underscores. Files cannot be encrypted or password protected.
If you need to change your license number or add another state license

Click the Functions dropdown at the top (middle) of the screen, then select **Add/Replace Real Estate License** to display the NAID Application Real Estate License screen.

![NAID Application Real Estate License Screen](image)

After entering all the required information and uploading your license, click **Validate License** in the lower left side of the window. If the Validate License button is not displayed, click **Save**. **Note:** Some states cannot be automatically validated, so only a Save button is displayed.

If the license cannot be validated using the **Validate License** button, you can change the information and try validating again or you can click the **Save** button. Once the license is validated or saved, the window will close and the NAID Application screen will appear.

If you need to update the Business Address (1099) and/or the Remittance Address (DBA)

Update either or both of those addresses and click **Save and Continue Working on the Application**.

The Functions dropdown at the top (middle) of the screen adds an **Upload Required Documents** link. Select this link to display the Upload Required NAID Documents screen:

- For the updated Business Address (1099), you must upload a copy of the IRS documentation for HUD to review. This usually is a 147C Letter from the IRS for an EIN-based NAID or a copy of a signed Social Security card for an SSN-based NAID.
- For the updated Remittance Address (DBA), you must upload a copy of a recent (within the last 60 days) phone bill, utility bill, or bank statement for HUD to review.
When the documents are selected, click the Save button in the upper left of the screen.

**Updating the NAID Information on the NAID Application screen**

Updates to the following items will not require HUD review or E-Signature signing:

- Business Phone Number
- Remittance (DBA) Name
- Contact Name, Email Address, Phone or Fax Number

If any of the following items are updated, HUD may require documentation to be uploaded. The table below lists the requirements based on the changes to the form:

<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 (for example, 147C Letter for EINs or signed Social Security Card for SSN-based NAIDs)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Remittance (DBA) Address</td>
<td>Copy of recent Telephone Bill, Utility Bill, or Bank Statement</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Add/Replace Real Estate License</td>
<td>Copy of Principal Broker’s State Real Estate License</td>
<td>Yes if the new license number cannot be automatically verified</td>
<td>No</td>
</tr>
</tbody>
</table>
Step 4 – Submit the Application

Once any needed changes are saved and, if needed, required documents are uploaded, the recertification application is ready to submit. Be sure the 1099 address is confirmed in the Business Address section.

Click the **Save and Submit Application to HUD for Review** button. A message appears:

![Save and Submit Application to HUD for Review](image)

Click **OK** to submit the recertification application to HUD or click **Cancel** to review the application and submit to HUD at a later time.

Recertification will take place immediately for updates to the Business Phone Number, Remittance (DBA) Name, Contact Name, Email Address, Phone or Fax Number, and the Principal Broker’s Phone Number and email address. Other updates will require a HUD review and/or a new E-Signature.

Updates to the Broker Certification Date and Broker Recertification Date are seen in the Selling Broker Information area of the NAID Application screen.

| Broker Certification Date | 10/13/2022 | Broker Recertification Date | 10/13/2023 |

**If the HUD Staff Rejects the NAID Recertification Application**

If HUD staff rejects any of the updated form data or the uploaded documentation, the user receives an email with the reason(s) for rejection. They then have the opportunity to go back into the NAID Portal, select **Correct Rejected Application**, and make any needed corrections to the application.
Selling Broker—Modify Existing Payee (NAID)

You should generally choose Password Reset and Account Recovery If Email Address Has Changed

Password Reset

To reset the password, click the Forgot Password? link to display the Account Recovery window.
Enter the email address for the account and click the **Submit** button.

**Note:** If you no longer have access to this account’s email address, see [Account Recovery If Your Email Address Has Changed](#) on page 31.
If there’s a match, the following message displays:

![Account Recovery](image)

Click the **ENTER TEMPORARY CODE** button and get set to enter the temporary passcode which expires 20 minutes after being sent. Check your email for the temporary passcode.

Here’s a sample of the Temporary Passcode email that is sent.

```
NAID Portal Password Reset

( do-not-reply@HUDP260.com)
To: you (Ecc) + 1 more Details  

Hello,

Your NAID Portal password reset code is: 473316
This temporary code will expire in 20 minutes.
Please navigate to the NAID Portal and enter this code to set a new password.

Note: This is an auto-generated mail. Please do not reply.
```

Note that you can click the [NAID Portal](#) link within the email to display the screen below where the temporary password is entered.
Enter the temporary passcode and click the **RESET PASSWORD** button to display the NAID Portal Change Password screen where you enter two copies of a new (never before used) password.

If the temporary passcode has expired, then click the **GENERATE A NEW TEMPORARY PASSCODE** button and return to your email to retrieve it.
To recover your account if your email address has changed, click the **Forgot Password?** link to display the Account Recovery window.

Click the “I no longer have access to this email” link.
Fill in the required information including the NAID, the EIN/SSN number, and the Principal Broker’s last name, then click **Submit**.

If the email change is successful, you’ll see the following message.
Click the **ENTER TEMPORARY CODE** button and get set to enter the temporary passcode which expires 20 minutes after being sent. Check your email for confirmation of the change and for the temporary passcode.

Here are samples of the two emails that are sent:
Note that you can click the NAID Portal link within the above email to display the screen below where the temporary password is entered.

Enter the temporary passcode and click the RESET PASSWORD button to display the NAID Portal Change Password screen where you enter two copies of a new (never before used) password.

If the temporary passcode has expired, then click the GENERATE A NEW TEMPORARY PASSCODE button and return to your email to retrieve it.
Enter two copies of your new password and click **Submit**. You will be logged into the NAID Portal.

**Note:** This change of email address has updated the account’s email address and the username on the account.

Selling Broker—Recertification (see page 28) since it will extend the recertification date for a year and adds only a check box in the Business Address area to validate that the Business Address can receive 1099s.

**Step 1 – Updating Information on the NAID**

To update information on an existing NAID, select **Modify Existing Payee**. A message displays:

Select **Confirm** to display the NAID Application screen or select **Cancel** to return to the options screen to select a different option.
**Note:** If the broker registration is tied to a Social Security number and the Selling Broker changes, then a new NAID application is required. There is no way to change the Selling Broker on an individual NAID tied to a Social Security number. The previous Selling Broker can put in a NAID Deactivation Request whenever they would like.
### NAID Application Screen

**Modify Existing Payee**

**Application Type**: Modify Existing Payee

**EIN**

**Payee Existing NAID**

**NAID Status**: Active

**Business Address (1099-MISC sent here)**

<table>
<thead>
<tr>
<th>Business Street Address*</th>
<th>Business City*</th>
<th>Business State, 5-4 Digit Zip Code*</th>
<th>Business Phone Number*</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Redacted]</td>
<td>PHILADELPHIA</td>
<td>PA 19100-0000</td>
<td>[Redacted]</td>
</tr>
</tbody>
</table>

**Remittance Address (DBA) (Physical Address - No PO Boxes)**

<table>
<thead>
<tr>
<th>Remittance Name*</th>
<th>Remittance Street Address*</th>
<th>Remittance City*</th>
<th>Remittance State, 5-4 Digit Zip Code*</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>PA 19100-0000</td>
</tr>
</tbody>
</table>

**Copy Name and Address from Business Info**

**Name of Contact Person**

**Contact Phone**

**Contact Email**

**Selling Broker Information**

<table>
<thead>
<tr>
<th>Principal Broker's Email</th>
<th>Principal Broker's Name (First, Last)*</th>
<th>Principal Broker's License</th>
<th>Broker Certification Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td></td>
<td>11/17/2022</td>
</tr>
</tbody>
</table>

**Principal Broker's Phone #**

**Principal Broker's Mobile #**

**Principal Broker's Licensed State(s)**

<table>
<thead>
<tr>
<th>Broker Recertification Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/17/2023</td>
</tr>
</tbody>
</table>

**Minority-Owned Code**

**Small Business Owned**

**Name(s) of Owner(s)/Principal(s)**

**Woman Owned**

**Family/External Business Relationship to HUD/M&M Contract employees?**

**No**

**Application Status**

**Application Number**: 585991

**Application Status Date**: 11/17/2022

**Preparer's Name**

**Preparer's Title**: PRINCIPAL BROKER

**Preparer's Phone #**

**Preparer's Email**

**Preparer's Phone #**

**Preparer's Email**

---

This information enables HUD to record and process financial transactions in its automated SAMs system to dispose of acquired single-family properties. HUD reimburses M&M Contractors for their services in maintaining, marketing, and selling HUD homes, and HUD retains funds associated with the sale of these properties. The information enables HUD to create and maintain sound financial management practices and effective internal controls over the property disposition program. A response is required to obtain or maintain a benefit.

Privacy Act Statement: The Department of Housing & Urban Development (HUD) is authorized to collect the information on this form by the U.S. Housing Act of 1937, as amended. The Housing & Community Development Act of 1987, 42 U.S.C. 5341, authorizes HUD to collect Social Security Numbers (SSN). The information is being used as Payee reference information, IRS 1099 applicability, minority data collection information, payment remittance instructions and proof of business viability. The SSN is used as a unique identifier. HUD may disclose this information to Federal, State and local agencies when relevant to civil, criminal, or regulatory investigations and prosecutions. It will not be otherwise disclosed or released outside of HUD, except as required and permitted by law. Providing the SSN is mandatory. Failure to provide the information could result in a delay or rejection of your eligibility approval.

Save and Continue Working on the Application
Updating the NAID Information on the NAID Application screen

Updates to the following items will not require HUD review or E-Signature signing:

- Business Phone Number
- Remittance (DBA) Name
- Contact Name, Email Address, Phone or Fax Number

If any of the following items are updated, HUD may require documentation to be uploaded. The table below lists the requirements based on the changes to the form:

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<td>Copy of IRS Documentation (for example, 147C Letter for EINs or signed Social Security Card for SSN-based NAIDs)</td>
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<td>No</td>
</tr>
<tr>
<td>Remittance (DBA) Address</td>
<td>Copy of recent Telephone Bill, Utility Bill, or Bank Statement</td>
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<td>No</td>
</tr>
<tr>
<td>Add/Replace Real Estate License</td>
<td>Copy of Principal Broker’s State Real Estate License</td>
<td>Yes if the new license number cannot be automatically verified</td>
<td>No</td>
</tr>
</tbody>
</table>

Requirements for Address changes

If the Business (1099) Address or Remittance (1099) Address changes, the user receives an on-screen message asking them to upload the required documents. Users then click the Functions dropdown at the top (middle) of the screen and select the Upload Required Documents link to review which documents require uploading.

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 you need to update your license expiration date

Users click the Functions dropdown at the top (middle) of the screen. Click [Verify Real Estate Licenses] to display the Verify Real Estate Licenses screen.

Enter the new expiration date, click “Replace License” to link to the new copy of your license, and click Save to complete the document upload and update to the expiration date.

Requirements for Changing a License Number or Adding a new Real Estate License

If the Principal Broker’s License Number changes or they wish to add a license for another state, they need to use the Function dropdown’s [Add/Replace Real Estate License] link to add the new Real Estate License Information (License Number, Licensed State, License Expiration Date) and upload a copy of the new Real Estate License.

If the new license is automatically verified against the online Real Estate License website, the Principal Broker is able to start placing bids on properties in that state immediately.

If the new license cannot be verified, HUD staff will need to review and approve the license.
After entering all the required information and uploading your license, click **Validate License** in the lower left side of the window. If the Validate License button is not displayed, click **Save**.

**Note:** Some states cannot be automatically validated, so only a Save button is displayed.

If the license cannot be validated using the **Validate License** button, you can change the information and try validating again or you can click the **Save** button. Once the license is validated or saved, the window will close and the NAID Application screen will appear.

**If the HUD Staff Rejects the Modified NAID Application**

If HUD staff rejects any of the updated form data or the uploaded documentation, the user receives an email with the reason(s) for rejection. They then have the opportunity to go back into the NAID Portal, select **Correct Rejected Application**, and make any needed corrections to the application.
Selling Broker—Add or Modify Offices

On the NAID Application screen, the link under the Functions dropdown at the top (middle) of the screen permits you to add one or more offices to your NAID. These are offices that are under the same principal broker.

For offices that will be under different principal brokers, you need to select the Add New NAID to Existing Payee (EIN) option to create a new NAID for each office (see Selling Broker—Add New NAID to Existing Payee (EIN only) on page 65).

Add one or more offices

- Log into the NAID Portal.
- Click the Modify Existing Payee button to display the NAID Application screen.
- Click the link in the Functions dropdown. The Vendor Office screen appears.
- Enter the required information for each office.
- Click Save.

Remove one or more offices

- Log into the NAID Portal.
- Click the Modify Existing Payee button to display the NAID Application screen.
- Click the link in the Functions dropdown at the top (middle) of the screen. The Vendor Office screen appears.
- Select the Remove check box to the left of each office you want to remove.
- Click Save.
Selling Broker—Manage User Access

Once a NAID is created, the Principal Broker manages who has access to the NAID for recertification and updates to any information.

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

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:

```plaintext
Access granted to HUD NAID Portal

do-not-reply_HUDP260@yardi.com  1:50 PM (1 minute ago)
Hello [USER],

You have been granted access from [EIN/SSN] to the NAID Portal.

Please click HERE to complete your registration.

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

If you have any questions, please contact the FHA Resource Center at (800) CALL-FHA (225-5342).
```

- **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.
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.
Selling Broker—Request NAID Deactivation

If your NAID is deactivated by HUD, you and your agents will no longer be able to bid on HUD homes using this NAID. In addition, your company will no longer appear when someone uses the “Find a Broker/Agent” on HUD Homestore.

Should you want to have an active NAID in the future, you will be required to go through the process of submitting an application for a new NAID.

**Note:** A NAID cannot be deactivated if it is linked to an active HUD transmittal.

To request your NAID be deactivated, click the **Modify Existing Payee** option, then click Confirm to display the NAID Application screen.

On the Functions dropdown at the top (middle) of the screen, select **NAID Deactivation Request**. A warning message displays:

Click **OK** to continue with the deactivation process or click **Cancel** to return to the previous screen.

Enter the reason why you are requesting your NAID to be deactivated and click **Save**. You are asked to confirm your request.
Click **OK** to confirm, and your request is sent to HUD. Click **Cancel** to keep the NAID Active. HUD staff will decide whether to honor the cancellation request or not.

**If HUD deactivates your NAID,** you and your agents will no longer be able to bid on HUD homes using this NAID.

**If HUD decides not to deactivate your NAID,** your NAID will remain active, and, when you log into the NAID Portal, you will again be able to modify an existing payee, add a new NAID to an existing payee, and recertify your NAID.
Selling Broker—Add New NAID to Existing Payee (EIN only)

The Add New NAID to Existing Payee function is appropriate for multiple offices with a different principal broker for each office.

**Note:** If the offices are within the same state and have the same broker, use the Add an Office functionality (see Selling Broker—Add or Modify Offices on page 59).

**Step 1 – Completing the Application for the New NAID**

If the NAID is associated with a Business (EIN), a new Payee (NAID) can be created for a different Principal Broker and/or Office location by clicking the Add New NAID to Existing Payee (EIN) option.

A message displays:

```
Use this application:
• To add a new office and obtain a NAID for that office
• To add a new office with a new Principal Broker (Broker Payees)

DO NOT USE this application:
If using a broker that is already linked to an active NAID. Instead you should be using the Add office functionality for that NAID.
```

Click **Confirm** to continue. The NAID Application screen appears with partial information pre-populated from the existing NAID including:

- EIN
- EIN Business Name
- Business Address and Phone Number
- Name of Owner(s)/Principal(s)

You are required to supply the following information for the new Payee (NAID):

- Remittance Name and Address
- Principal Broker Name, Email Address and Phone Number
- Contact Name, Email Address and Phone Number
- Preparer’s Title
Once the information is added and the form is saved, an alert appears on-screen asking the applicant to upload the required documentation.
Add Principal Broker’s Real Estate License

On the Functions dropdown at the top (middle) of the screen, select **Add/Replace Real Estate License** to add the Principal Broker’s Real Estate license information and upload copies of their Real Estate Broker’s License and their Driver’s License or State Identification. You can also click the Add Principal Broker License link in the workflow.

**Note:** Allowable document types are those with .pdf, .doc, .docx, .jpg, or .png file extensions. Files may not be encrypted or password protected.

After entering all the required information and uploading the Real Estate license and Driver’s License, click **Validate License** in the lower left side of the window. If the Validate License button is not displayed, click **Save**.

**Note:** Some states cannot be automatically validated, so only a Save button is displayed.

If the license cannot be validated using the **Validate License** button, you can change the information and try validating again or you can click the **Save** button. Once the license is validated or saved, the window will close and the NAID Application screen will appear.
Upload Required Documentation

On the Functions dropdown at the top (middle) of the screen, select **Upload Required Documents** to display a screen which lists the documents that are required to complete the application. You can also click the Upload Required Documents link in the workflow.

Selling Brokers are required to submit the following additional documents:

- IRS Documentation – Document showing the Business Name/Individual Name and Tax Identification Number (TIN). Examples include the IRS 147C Letter or a Tax Return with preprinted label from the IRS.
- Copy of first page of recent (with the last 60 days) telephone bill, utility bill, or bank statement

After the documents have been selected, click the **Save** button in the upper left of the window. After saving, click **Close** to exit the screen.

Documents must be a PDF, jpeg, or jpg, or Word (.doc or .docx) file.
Documents that are encrypted or password-protected will be rejected.

Once all the required documents are uploaded, the application is complete and ready to submit to HUD for review. The **Save and Submit Application to HUD for Review** button becomes “live.” When you click the button, a message appears letting you know you can click “OK” to submit the application to HUD or click “Cancel” to review the application and submit it to HUD at a later time.
The NAID Application screen displays a workflow at the top of the screen indicating where you are in the process of securing a new NAID.

**Rejected Applications**

If HUD staff rejects any of the uploaded items, they are required to add a comment letting you know why the item was rejected. An email is sent with the reason(s) for rejection.

**Resubmitting Rejected Applications**

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

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

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, a SAMS-1111-A, 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.
If the application was completed by the Principal Broker, the following signatures are required:

- **Principal Broker** – signs the SAMS-1111 and SAMS-1111-A
- **HUD Reviewer** – signs the SAMS-1111
- **HUD Approver** – signs the SAMS-1111

If the application was completed by someone on behalf of the Principal Broker, the following signatures are required:

- **Preparer** – will sign the SAMS-1111
- **Principal Broker** – signs the SAMS-1111-A
- **HUD Reviewer** – signs the SAMS-1111
- **HUD Approver** – signs the SAMS-1111

**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.

Principal Broker Signature/Pending NAID Creation

After the Principal Broker signs the document and clicks the FINISH button, the following occurs:

- A “Pending” NAID is created which permits the Selling Broker to register on HUD Homestore and place bids on properties.

- The Principal Broker receives an email with the NAID along with instructions for registering and placing bids on HUD Homestore. If someone else prepared the application, they will also receive a copy of this email.
The HUD Reviewer responsible for reviewing the application receives the envelope to sign.

HUD Approver Signature: NAID Activated

After the HUD Reviewer signs the document, the envelope is sent to the HUD Approver for their signature. When the HUD Approver signs the document, the following occurs:

- The “Pending” NAID becomes an “Active” NAID.
- The Certification Date is set to the date the Approver signs and the Recertification Date will be the Certification Date plus 365 days.
- The Principal Broker receives an email indicating the NAID is now active and includes instructions for recertifying the NAID on a yearly basis. If someone else prepared the application, they will also receive a copy of this email.
- A PDF copy of the completed envelope with signatures is added as an attachment on the NAID Application screen.

Adding State Licenses and Modifying NAID Information

Now that the NAID is active, you can modify NAID information and add additional state licenses using the Add/Replace Real Estate License link on the Functions dropdown at the top (middle) of the NAID Application screen.
Selling Broker—Change Email Address

When a Selling Broker or Preparer changes their email address, that change updates the username for their login as well. The change in the email address updates the email address on any associated NAID(s).

To change the email address on a NAID Portal account

Log into the NAID Portal account.

On the Options screen, select Change My Email Address. The Change Email Address screen appears.

Enter and confirm the new email address. Be sure it’s accurate since it will be your username for the selected NAID(s) and it is where temporary passcodes will be sent.

Click the Save button. A message appears.

Click OK to confirm the email address change for the selected NAID(s) or click Cancel to review the new email address or change your NAID selection.

The system sends a notification about the email address change to the old email address.
Hello Wayne Kliman,

The email address for your NAID Portal user account was changed from [old_email] to [new_email].

If you did not initiate this email address change or you do not recognize the new email address, please contact the Help Desk at HUDHomestorehelp@yardi.com or (866) 777-2634. The Help Desk hours are 8 am to 8 pm Eastern Time, Monday through Friday, except for federal holidays.

Note: This is an auto-generated mail. Please do not reply.
Selling Broker—Replacing Principal Broker on NAID

This applies only to EIN-based NAIDs, since SSN-based NAIDs are tied to the Social Security number for the Principal Broker.

To begin the process of replacing the Principal Broker on a NAID, select the Replace Principal Broker on NAID choice on the NAID Application Portal list of actions. This displays the Replace Principal Broker on NAID screen.

If you’re not sure how to get to the list of actions, go to Registering for the NAID Portal If You Don’t Have a NAID on page 2.

Enter the NAID, EIN, previous broker’s email, and the first and last name of the previous broker.

Click Submit.
Enter the first and last name of the new broker, the phone number, and the new email address.

**Note:** This must be a different email address than that of the previous broker.

Click **Register**. A message displays confirming that the broker takeover process has begun.
An email is sent to the previous broker notifying them that a broker change has been started for this NAID.

**Principal Broker change for HUD NAID**

do-not-reply_HUDP260@yardi.com

to:  

Date: 11/18/2022

Dear 

Currently you are listed as the Principal Broker for . This is a courtesy email to let you know that a broker change has been started for this NAID. If you have any questions about this transition, please contact the real estate office this NAID is linked to.

Thank you!
The NAID Portal Help Desk
A second email is sent to the new broker inviting them to register for the NAID Portal.

![Image of email invitation]

Your request for broker takeover 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 forgot your password, the system will require the email address you used to provide a temporary passcode so you can log in.

Next, log in and select "Complete Broker Takeover", add your broker real estate license with a future expiration date, upload supporting documents, and submit to HUD for review. You and your agents will not be able to place bids on HUDHomestore until HUD has approved the takeover.

Please let the Help Desk know if you have any further questions or if you need further assistance. We can be reached by email at HUDHomestorehelp@yardi.com or by phone at (866) 777-2634. The Help Desk hours are 8 am to 8 pm Eastern Time, Monday through Friday, except for federal holidays.

The new broker clicks the blue HERE on their invitation to register. The Create NAID Portal Login screen appears with the new email address inserted as the new username and the optional mobile phone number already entered.
After entering two copies of the password, the broker clicks Submit. The NAID options window appears.

Select one of the following options

- Continue Broker Takeover
- Manage NAID Portal Users
- Change My Email Address

**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 **Continue Broker Takeover**. The NAID Application screen displays where the next task is to upload copies of the Principal Broker’s Real Estate license and their Driver’s license.

Select the **Update Principal Broker License Information** workflow item or, under the Functions dropdown, select the **Add/Replace Real Estate License** link.

The NAID Application Real Estate License Screen appears.
After entering all the required information and uploading your RE license and Driver’s License, click Validate License in the lower left side of the window. If the Validate License button is not displayed, click Save.

**Note:** Some states cannot be automatically validated, so only a Save button is displayed.

If the license cannot be validated using the Validate License button, you can change the information and try validating again or you can click the Save button. Once the license is validated or saved, the window will close and the NAID Application screen will appear.

On the NAID Application screen, be sure to select the “This is the valid address where 1099s will be sent” check box.

Scroll down just below the two paragraphs toward the bottom of the window and click the Save and Continue Working on the Application button.

Then click the Save and Submit Application to HUD for Review button. A message displays. Click OK to confirm your submission or click Cancel to return to your application.

When HUD approves the application, an E-Signature process will complete the broker takeover.

**Note:** The new Principal Broker then creates a bidding account on HUDHomestore.gov (see Broker Registering as Bidder on HUDHomestore.gov on page 88).
Selling Broker—Broker Legal Name Change

**Note:** This is not a change in the Principal Broker; it’s a legal name change for the existing broker. Also, this name change will require an E-Signature validation of the name change.

To begin the process, log into the NAID Portal account.

Select the **Selling Broker Recertification** option and confirm that choice.

At the NAID Application screen, go to the Function dropdown and select Broker Legal Name Change.

The “Change Name of Present Principal Broker” screen appears.

Fill in the New First Name and New Last Name of the existing broker and click Save. If the first name is not changing, then fill in the previous first name.

Click the **Save** button. The NAID Application screen appears.

To validate the name change, you need to click the Add/Replace Real Estate License (under the Functions dropdown) or click the “Update Principal Broker License Information” workflow item. The NAID Application Real Estate License screen appears.
After entering all the required information and uploading your RE license and Driver’s License, click the Validate License button in the lower left side of the window. If the Validate License button is not displayed, click Save.

**Note:** Some states cannot be automatically validated, so only a Save button is displayed.

If the license cannot be validated using the Validate License button, you can change the information and try validating again or you can click the Save button. Once the license is validated or saved, the window will close and the NAID Application screen will appear.

On the NAID Application screen, be sure to select the “This is the valid address where 1099s will be sent” check box.

Scroll down just below the two paragraphs toward the bottom of the window and click the Save and Continue Working on the Application button.

Then click the Save and Submit Application to HUD for Review button. A message displays. Click OK to confirm your submission or click Cancel to return to your application. When HUD approves the application, an E-Signature process will complete the broker name change.

Create a new Principal Broker bidding account on HUDHomestore.gov (see page 88) since the previous bidding account will be made inactive because of the name change.
HUD Homestore Changes

NAID Application Tab

The NAID Application tab has been updated with wording related to the new Online NAID Application process. Click the word here to display the NAID Application Portal list of actions.

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.
To find a NAID using the SSN/EIN number and check the status of the application and the Real Estate license expiration date, select the “Find NAID and Check Application Status” action.

Enter the Business EIN or the Individual SSN and click **Submit**.
Click “CHECK DATES” to verify the Recertification Date and the License Expiration Dates.

To check the NAID Recertification and License Expirations Dates using the NAID, select the “Check NAID Recertification and License Expiration Dates” action.
Enter the NAID and click Submit.
Broker Registering as Bidder on HUDHomestore.gov

Once a NAID is active (or, in the case of a new NAID application, a Pending NAID has been created), the Principal Broker for that NAID can register as a bidder on HUD Homestore.

In the upper right corner of the home screen of HUDHomestore.gov, they click the Bidder link under Register. They select a NAID type of Selling/Listing Broker, and a role of Principal Broker with NAID.

![Login Register](Image)

The Principal Broker Verification screen appears where they enter the SSN/EIN, NAID, and the Principal Broker email address and then click Continue.

Once the information is verified against the information entered on the NAID Application screen, the Broker’s License Information and Contact Information are pre-populated.

The following information can be updated in HUD Homestore via the Manage Profile tab:

- State License Date (date license was originally granted)
- Office Information
- Phone Number and Fax Number

The following information must be done using the NAID Portal:

- Updating the State License Expiration Date
- Modifying the current Real Estate License Number
- Adding a license for a different state
- Changing the email address of the broker

Bid Submission

Selling Brokers and Agents can’t place bids if either their Real Estate License has expired or the NAID recertification date has passed. If the Selling Broker attempts to place a bid, an explanatory message will display when the bidder clicks the Verify NAID button.