



# Lakeview

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## Correspondent Non-Delegated Portal Reference Guide

### Managing Conditions





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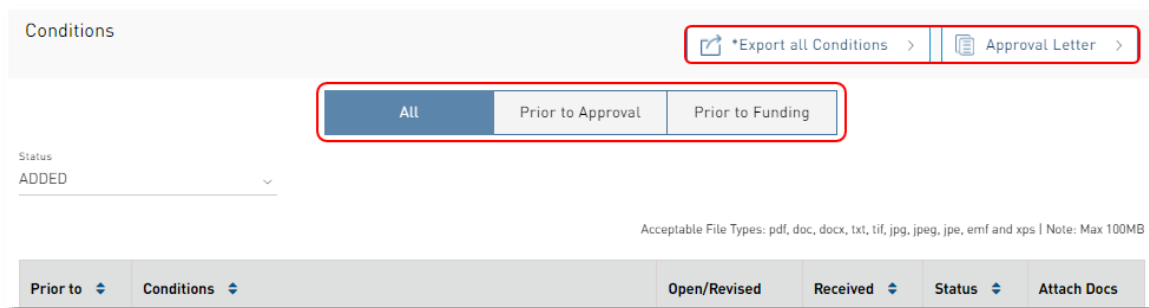
## 1. Overview

The Non-Del Portal displays conditions under different tabs: **All**, **Prior to Approval**, and **Prior to Funding**. Upload the supporting documents for each condition listed and submit the request to satisfy the condition.

The portal accepts pdf, doc, docx, txt, tif, jpg, jpeg, jpe, emf, and xps file formats up to a file size of 100 MB.

To export conditions to a spreadsheet, click **\*Export all Conditions** from the **Conditions** screen.

If the loan status is in **Conditional Approval** or **Final Approval**, download the **Approval Letter** from the **Conditions** screen.



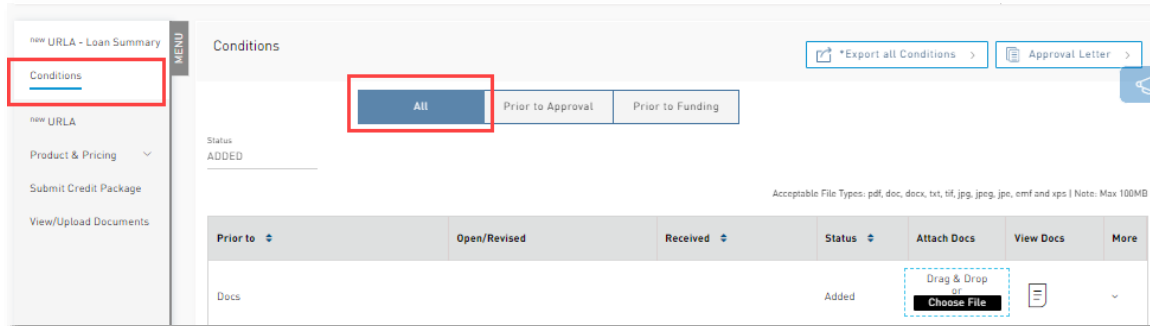
## 2. Features of the Conditions Screen

Loans with unsatisfied conditions have the number of outstanding conditions indicated in the **Pipeline**.

1. To open the loan directly to the **Conditions** dashboard, click the number in the **Conditions** column.
2. To view conditions on your loans, click the **Loan No.** from your **Pipeline** and open it.

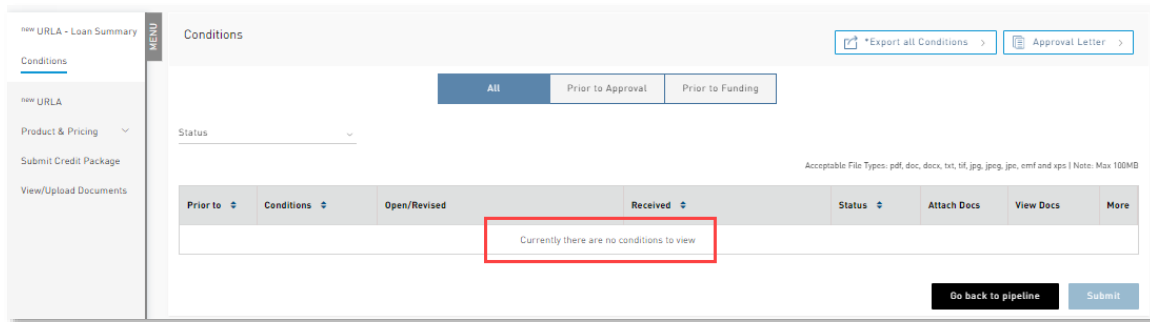
Loan No	Borrower Name	Loan Status	Loan Purpose	Loan Amount	Lock Status	Lock Expiration	Conditions	Lender Case Number	Lender Loan Number	Action
9000011694	DOMENIC TESTLOAN	Submit to UW	Purchase	\$ 300,000	Locked	05/18/2022	0	9000011694	9000011694	
9000011604	ALICE FIRSTIMER	Conditional Approval	Purchase	\$ 175,000	Expiring	05/09/2022	43	9000011604		
9000011608	ALICE FIRSTIMER	Loan Created	Purchase	\$ 175,000	Expiring	05/09/2022	0	9000011608		

a. Click **Conditions** to navigate to the **Conditions** dashboard.



**Outcome:** The **All** tab is the default view and lists all conditions regardless of the condition category.

- In no data are found, the message **Currently there are no conditions to view** displays.

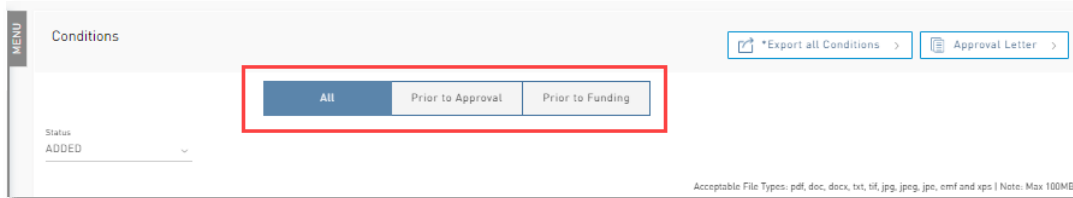


## 2. Features of the Conditions Screen, continued

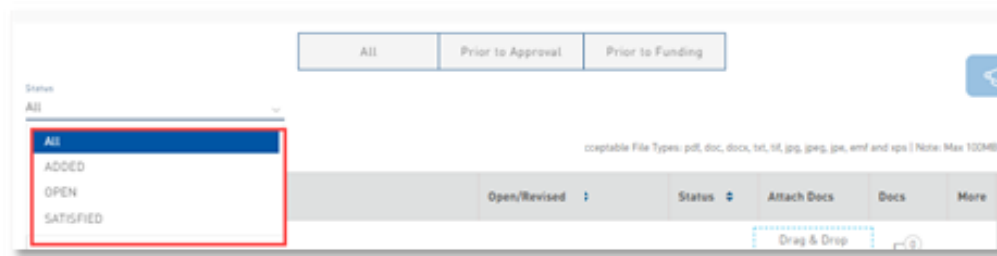
### Viewing Conditions

The **Conditions** dashboard features options to view by category or **Status**.

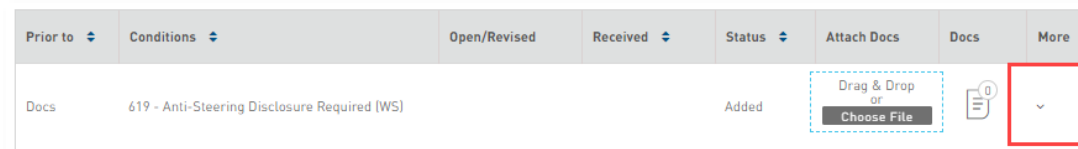
1. Select a category for conditions using the category bar at the top of the **Conditions** screen.



2. Filter the list by **Status** by selecting the appropriate status from the drop-down list.



3. Click the **▼** icon to display the descriptions from Encompass.



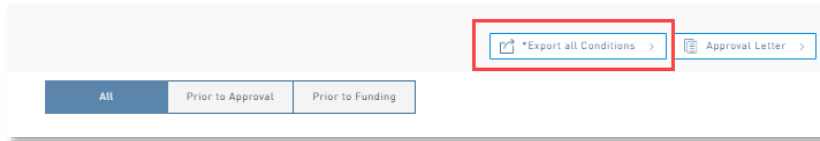
**Note:** If the Underwriter enters a comment supporting the condition, the comment displays under **Revision Comments** when viewing the condition details.

- **Revision Comments** has a **Read More** button to view the entire comment in a separate dialogue box.

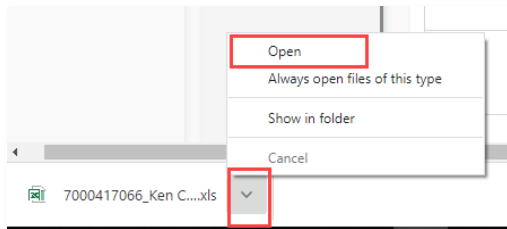
## 2. Features of the Conditions Screen, continued

### Export List of Conditions

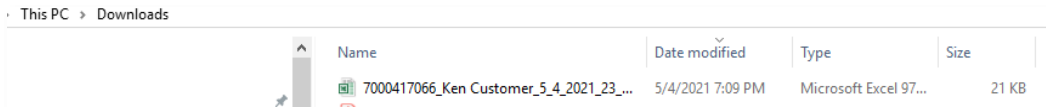
1. To export the list of conditions to an Excel workbook, click **\*Export all Conditions**.



2. Click the **▼** icon. Select **Open**.

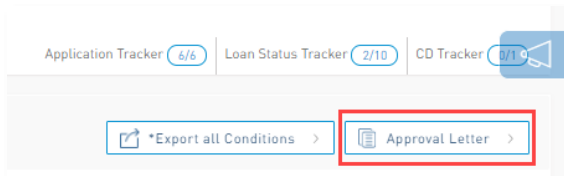


**Outcome:** A file opens in Excel.



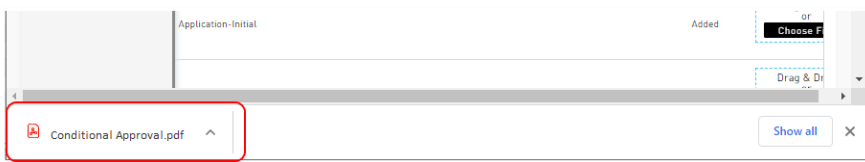
### Printing Approval Letter

1. To print a *Conditional Approval Letter*, click **Approval Letter**.



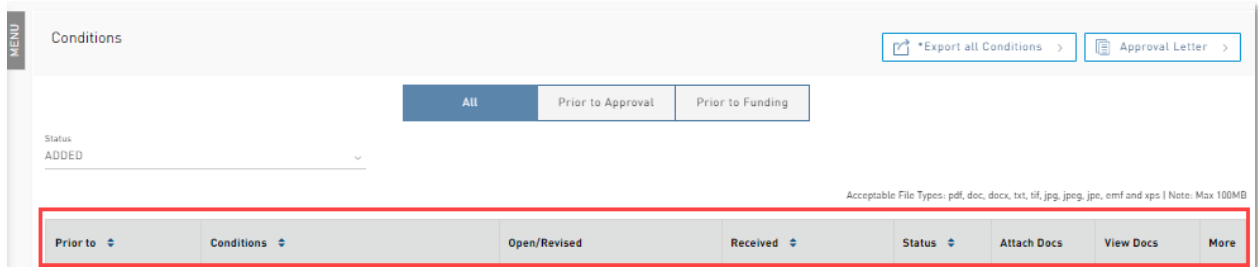
**Note:** This button is enabled when the loan is in either **Conditional Approval** or **Final Approval** status.

**Outcome:** The document appears in the lower-left corner of the page.



### 3. Column Headers on the Conditions Screen

The following section describes the dashboard columns when viewing the list of conditions.



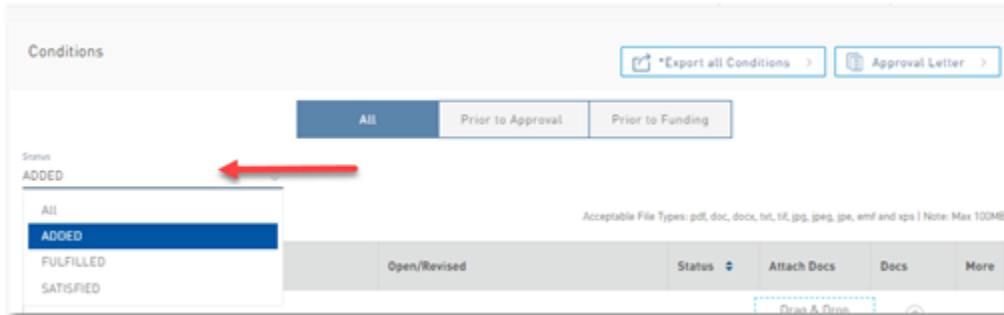
Column Heading	Purpose
<b>Prior to</b>	This describes the category of the condition.
<b>Conditions</b>	This is the name of the condition; the numerical portion is for internal use only.
<b>Open/Revised</b>	This is the date the condition was opened and/or revised by the Underwriter.
<b>Received</b>	This is the date the documents were received for review.
<b>Status</b>	This is the current status of the condition.
<b>Attach Docs</b>	This enables the user to upload documents supporting the condition.
<b>View Docs</b>	This displays documents uploaded.
<b>More</b>	This displays details of the condition including Underwriter comments if any.

## 4. Uploading Document to Clear Conditions

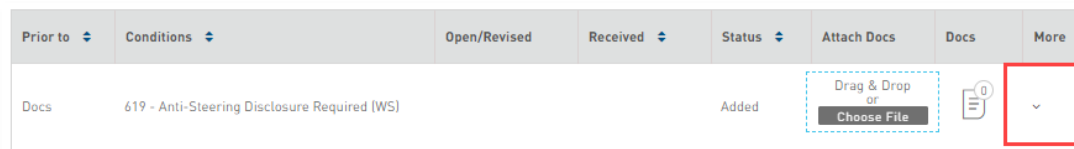
It is a best practice and recommended to upload one document at a time to clear one condition and click **Submit** on the bottom-right of the page before moving to another condition. This allows for quicker service to review and clear conditions.

1. Find the condition you want to clear.

**Note:** To view only open conditions, select **ADDED** or **OPEN** from the **Status** drop-down list.



2. Click the **▼** icon to display the descriptions from Encompass.



**Note:** If the Underwriter enters a comment supporting the condition, the comment displays under **Revision Comments** when viewing the condition details.

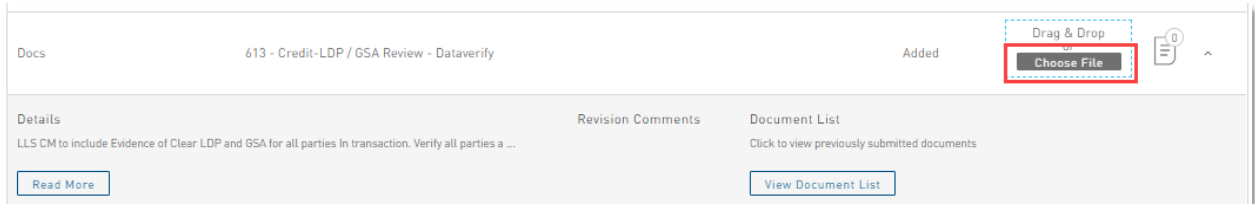


## 4. Uploading Documents to Clear Conditions, continued

The user may browse to upload a document using **Choose File** or use **Drag & Drop** to upload a file.

### Choose File

1. Click **Choose File**.

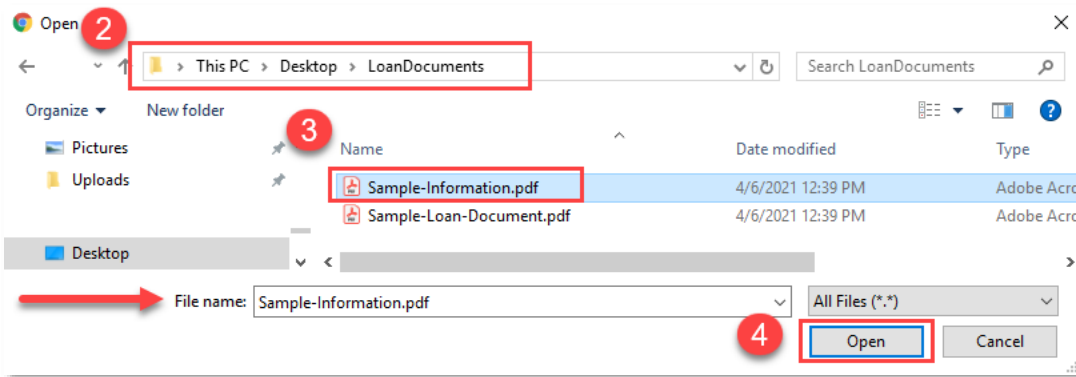


2. Navigate to the location of the document.

3. Select the document.

**Note:** The document name populates in the **File name:** box.

4. Click **Open** to upload the document to the portal.



5. Click **Submit** located on the bottom-right of the page to complete the submission of the document for review.

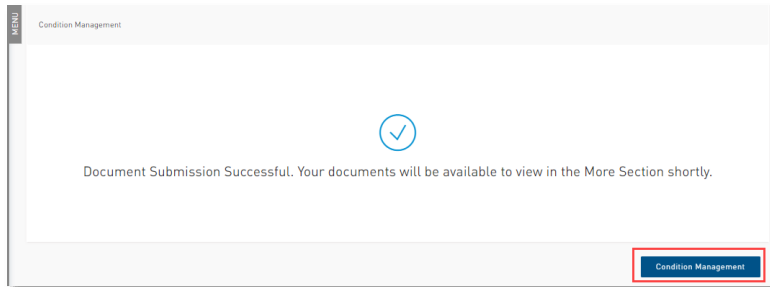


## 4. Uploading Documents to Clear Conditions, continued

### Choose File, continued

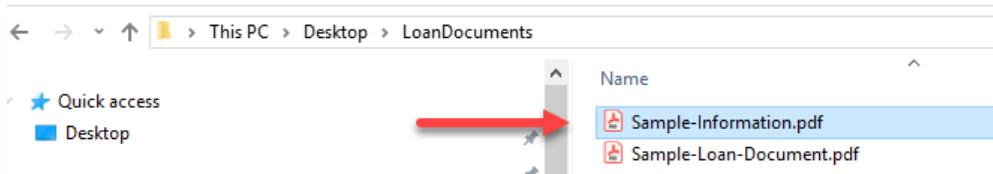
**Outcome:** A **Document Submission Successful** message displays

6. Click **Condition Management** to return to the **Conditions** screen.

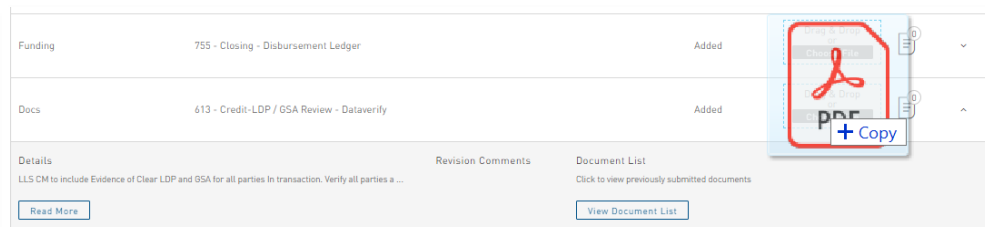


### Drag & Drop

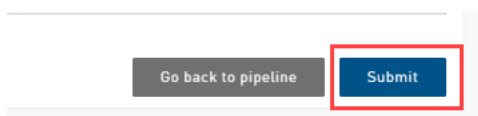
1. Navigate to the file to be uploaded for the condition.



2. Using your mouse, drag the highlighted file over the **Drag & Drop** box for the condition.



3. Click **Submit** to complete the submission of the document for review.



## 4. Uploading Documents to Clear Conditions, continued

### Drag & Drop, continued

**Outcome:** A **Document Submission Successful** message displays

4. Click **Condition Management** to return to the **Conditions** screen.

