



Lakeview

Correspondent Client Reference Guide

Using the Correspondent Client Website



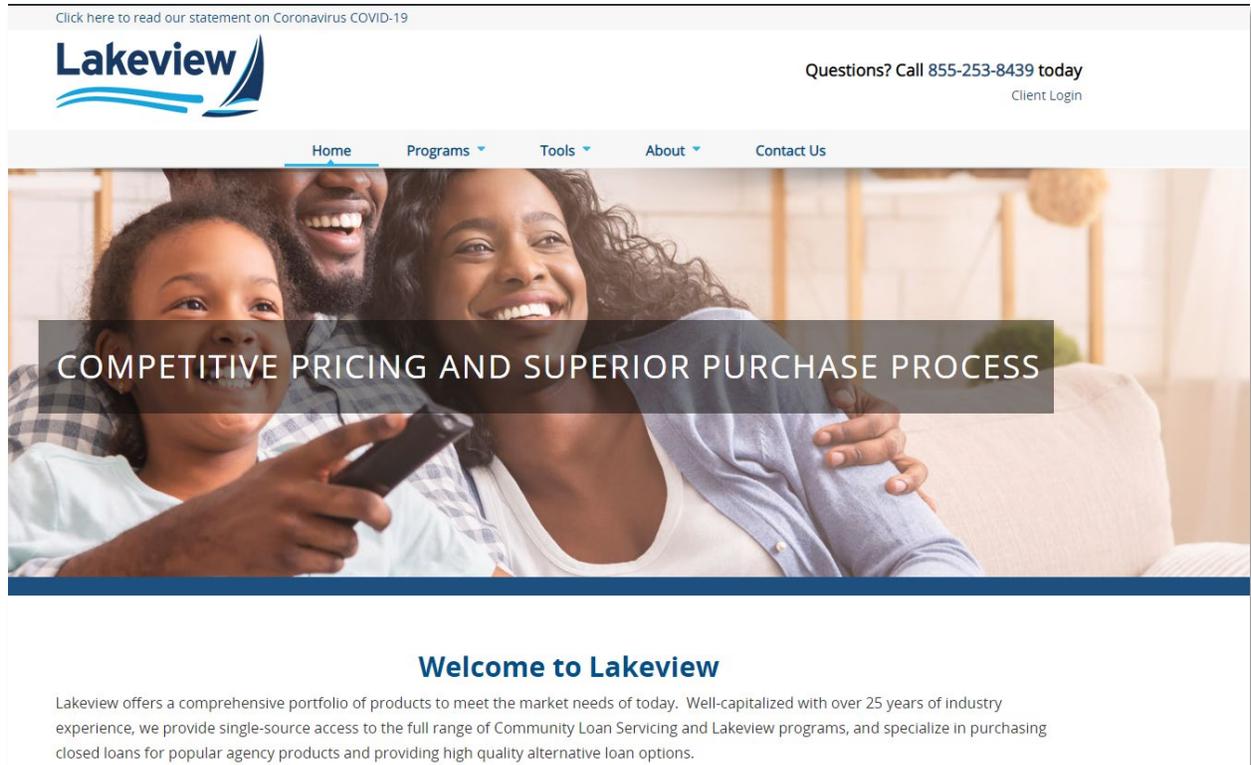
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1. Client Site Access and Login

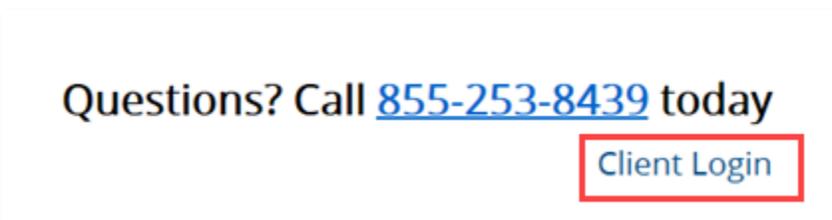
1. Access the client website from www.lakeviewcorrespondent.com. The client site provides information about correspondent lending programs and contact information.



Note: Consider saving this website address as a favorite!

Log in

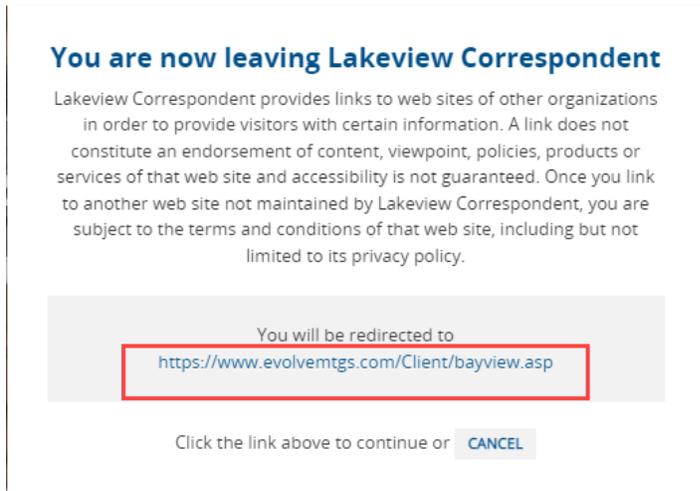
1. Click **Client Login** at the upper right hand corner of the website.



1. Client Site Access and Login, continued

Log in, continued

2. A window appears indicating that you are being redirected to another site. Click the link that is displayed.



Outcome: The **Client Site Login** screen displays.

3. Type your email address and password. Click **Logon**.



Note: If you have difficulty logging in, please contact Client Services at clientservices@bayview.com or 1.855.253.8439, Option 3 for assistance.



1. Client Site Access and Login, continued

Log in, continued

Outcome: The **Daily Turn Times** and **Announcements** screen displays.

Daily Turn Times

All Turn Times are Approximate and Updated Daily

	Initial Review:	Condi
Conv/Gov't/HFA	3 Days	2 Days
Jumbo	7 Days	3 Days
Non-Agency	Coming Soon	Coming

(In Average Business Days)

TURN TIMES ARE BASED ON RECEIPT OF LOAN IMAGES AND

Initial review: Number of business days from file receipt date to complete

Condition Review: Number of business days from trailing document receipt to review

Collateral Review: Number of business days from collateral receipt date to review

Announcements

Descriptions

[2022 All Announcements](#)

[C2022-09 - HFA, NonAgency, Operational Updates](#)

[C2022-08 - Website Change and Tax Transcript Temporary Suspensions](#)

[C2022-07 - Agency, DSCR, Jumbo and Operational Updates](#)



2. Landing Page

Daily Turn Times

The top half of the landing page displays the daily Turn Times in business days based on the product type.

Daily Turn Times

All Turn Times are Approximate and Updated Daily

	Initial Review:	Condition Clearing:	Collateral Review:
Conv/Gov't/HFA	3 Days	2 Days	3 Days
Jumbo	7 Days	3 Days	3 Days
Non-Agency	Coming Soon	Coming Soon	Coming Soon

(In Average Business Days)

TURN TIMES ARE BASED ON RECEIPT OF LOAN IMAGES AND ULDD (.XML) DATA FILE (WHEN APPLICABLE)

Initial review: Number of business days from file receipt date to completion of the credit and compliance review

Condition Review: Number of business days from trailing document receipt date to the completion of the condition review

Collateral Review: Number of business days from collateral receipt date to the completion of the custodian's collateral review

Announcements

The bottom half of the landing page displays all of the posted announcements.

1. Click the links listed under the **Description** column to open an announcement.

Announcements



Descriptions	Last Update
2022 All Announcements	4/8/2022 8:55:43 AM
C2022-09 - HFA_NonAgency_Operational Updates	4/8/2022 8:54:57 AM
C2022-08 - Website Change and Tax Transcript Temporary Suspension	4/4/2022 10:49:35 AM
C2022-07 - Agency_DSCR_Jumbo and Operational Updates	3/25/2022 9:47:21 AM
C2022-06 - Home in Five and Agency Inv Plus	3/11/2022 8:41:37 AM
C2022-05 - Agency and DSCR Updates	2/25/2022 9:30:40 AM
C2022-04 - AIP Expansion_Jumbo Update_Non-Agency Help Desk_Delivery Lock Reminders	2/18/2022 9:13:35 AM
C2022-03 - Agency_VA_HFA_DSCR_Jumbo Plus AUS Updates	2/10/2022 12:20:38 PM
C2022-02- SC Enhancements_Hoosier Homes Expansion_Jumbo Updates	1/28/2022 9:04:49 AM
C2022-01 - Agency Updates	1/14/2022 8:25:39 AM
2021 All Announcements	1/3/2022 7:03:19 AM
2020 All Announcements	12/30/2020 6:47:21 AM
2019 All Major Disaster Announcements	1/9/2020 10:46:30 AM
2019 All Announcement	12/19/2019 7:35:39 AM
2019 All Bayview Announcements	1/3/2019 3:10:13 PM

* Documents in PDF format require Adobe PDF Reader to view.



3. Navigation Toolbar

The navigation tool bar is located on the left hand side of the page. Use this to navigate through the site for the loan status, reporting or seller guide reference material, and much more.

Main
Loan Registration/Lock/Pricing
Current Rate Sheet
Broker Current Rate Sheet
(3021) Bayview/Lakeview UW
- Deliver Loans & Reporting
(3031) Bayview/Lakeview Wholesale
- Deliver Loans & Reporting
Announcements
Product Matrix Documents
Origination Guides
Exclusionary List
Services Ordering
Reference Library
(6033) BayView/Lakeview Closed Loan
- Deliver Loans / TDOCs
- Titanium ULDD/XML Upload
- Reporting
(6034) BayView/Lakeview MSR
- Deliver Loans / TDOCs
- Reporting





4. Main

1. Click **Main**. Depending on which login access is used, the **Reports Menu** or **Announcements** appears.

Note: If you are using the delivery method 6033(Bayview/Lakeview Closed Loans), click **Main** to view the **Reports Menu**.



Note: The next link in the left navigation, the **Loan Registration/Lock/Pricing** is covered in a separate job aid. Please refer to the **Registering, Pricing and Locking Loans** job aid.

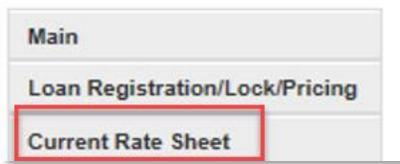
Descriptions	Last Update
Correspondent Pricing Job Aid	10/14/2019 7:48:48 AM
Correspondent Website Job Aid	10/14/2019 7:49:30 AM
Home in Five - Submitting, Pricing, and Locking a Loan Job Aid	5/6/2020 7:31:02 AM
Home in Five -Pricing and Locking a Loan Video	1/7/2020 10:35:30 AM
How to Name and Upload Documents in MRN	10/14/2019 7:51:20 AM
Jumbo Overview	2/26/2021 12:58:32 PM
Jumbo QM Overview	2/26/2021 12:58:49 PM
Jumbo Underwriting	2/26/2021 12:59:15 PM
Jumbo Underwriting QM Only	2/26/2021 12:59:39 PM
Jumbo Underwriting Video	10/22/2020 2:23:12 PM
Locking a First Loan with a Paired Second in the Lakeview Client Site Video	2/4/2020 12:08:31 PM
metroDPA - Program Overview	2/22/2021 12:39:03 PM
metroDPA/denverDPA - Submitting, Pricing, and Locking a Loan Job Aid	1/7/2020 10:35:30 AM
metroDPA/denverDPA Program Training Video	12/17/2019 10:04:39 AM
Naming and Uploading Documents	11/19/2020 7:25:56 AM
Naming Conventions for Document Upload	2/18/2021 2:21:29 PM
Registering Pricing and Locking Loans	11/18/2020 1:33:22 PM
South Carolina Housing - Delivering Loans	2/10/2021 12:57:18 PM
South Carolina Housing - Product Overview	2/25/2021 12:05:56 PM
Web Admin Job Aid	10/14/2019 7:44:32 AM





5. Current Rate Sheet

1. Click Current Rate Sheet to view current rate sheets for the Bayview products and Lakeview Government/Agency Products.



Current Rate Sheet

Descriptions	Last Update
Lakeview Rate Sheet	3/1/2021 8:59:08 AM
Bayview Rate Sheet	3/1/2021 8:58:57 AM

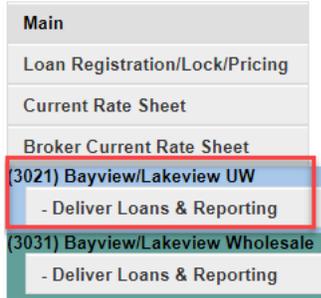
* Documents in PDF format require Adobe PDF Reader to view.





6. (3021) Bayview/Lakeview UW

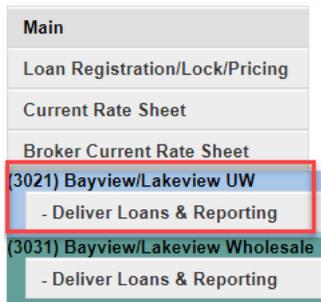
The **Deliver Loans & Reporting** link is used to upload loan documents for loans that Lakeview/Bayview needs to underwrite.



Follow the steps below to upload loan documents.

Note: Prior to upload, name the document with the proper naming convention, seller loan number_lastname_anything additional. For additional naming conventions please refer to the [Naming and Uploading Documents](#) job aid in the **Training Resources**.

1. Click **Deliver Loans & Reporting** on the left hand side navigation toolbar.





6. (3021) Bayview/Lakeview UW, continued

2. Click Upload Data/Image Files to 3021 (Bayview/Lakeview UW).

Reports Menu

Search by Loan Number... Loan Number Last Name

Board Images / Data Files To 3021 - Bayview/Lakeview UW

Supported File Formats:

- The best file format is PDF but other files must be in one of the following formats: BMP, DOC, DOCX, GIF, HTM, HTML, JPEG, JPG, MSG, PDF, PJP, PNG, TIF, TIFF, TXT, XLS, XLSX, XML, XPS
- Files should not be password protected or encrypted.

Loan image must be uploaded with Seller Loan Number as the leading characters of the file name

To name a document:
Start with the Seller Loan Number, underscore, borrower last name, underscore, description:

564077801_Royer_Appraisal

The red portion is the **Seller Loan Number** that was entered when the loan was registered.
The green portion is the **borrower last name**.
The blue portion is a **description of the document**.

To name your trailing doc (TDOC):
Start with the Seller Loan Number, underscore, borrower last name, underscore, TDOC, underscore, description:

564077801_Royer_TDOC_Appraisal

The red portion is the **Seller Loan Number** that was entered when the loan was registered.
The green portion is the **borrower last name**.
The purple portion is the **TDOC indicator**.
The blue portion is a **description of the document**.

Please [click here](#) for examples of our file naming convention and our complete upload guide.

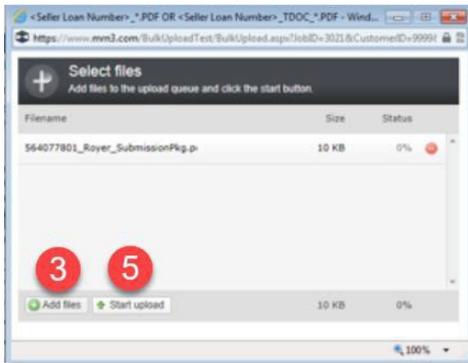
*** - To Upload TDOC images please use the loan search above and NOT this feature.**
Please note that individual files cannot exceed 115 MB in size; files above 115 MB may not be processed.



6. (3021) Bayview/Lakeview UW, continued

3. In the Select files dialog box, click Add files to search the computer for the loan document(s) to be uploaded.
4. Click Open once appropriate files are selected for upload.
5. When the desired document is displayed in the dialog box, click Start upload.

Outcome: When the document is displayed in the dialog box, click the Start upload button. A message appears confirming all files were uploaded.



Note: To delete a document that you may have mistakenly added, click the red circle to delete it.



6. Do not close out of this window until the green light indicator appears under the Status column and the confirmation message is received. Click OK to close.

7. (6033) Bayview/Lakeview Closed Loan

1. Use **(6033) Bayview/Lakeview Closed Loan** to upload loan documents for closed loans.
 - If the loan was previously underwritten by Bayview/Lakeview, upload only the closed loan package to this folder.
 - If the loan was underwritten by you, as a delegated Seller, upload both the credit and closing packages to this folder.



Reference Library

Descriptions	Last Update
Disaster Declaration File	3/10/2021 7:23:58 AM
Residency and Eligibility Guide	3/4/2021 9:59:45 AM
Borrower Financial Attestation Sample Form	3/16/2021 11:17:18 AM
Clear Capital New Client Form	8/18/2020 8:34:59 AM
Condo Questionnaire - Conventional Full Review	4/3/2019 1:14:47 PM
Condo Questionnaire - Conventional Limited Review	10/10/2019 6:07:34 PM
Correspondent Fee Schedule	3/15/2021 7:21:05 AM
Correspondent Lending Program Codes and Descriptions	10/31/2017 1:55:21 PM
Delivery File Checklist - Closing Documents	3/15/2021 7:22:12 AM
Delivery File Checklist - Credit File	6/29/2020 7:44:52 AM
Electronic Disclosures and E-Sign Policy	4/6/2015 11:21:53 AM
Eligibility Submission Checklist - Agency Products	11/1/2018 1:22:55 PM
Final Docs Shipping Transmittal	6/15/2017 8:14:01 AM
Lakeview Agency Scenario Submission Form	9/14/2016 2:02:31 PM
Loan Attestation/Borrower Certification Letter	9/14/2016 2:03:43 PM

Follow the steps below to upload loan documents:

Note: Prior to upload, name the document with the proper naming convention, seller loan number_lastname_anything additional to the name. For additional naming conventions please refer to the [Naming and Uploading Documents](#) job aid in the Training Resources.

7. (6033) Bayview/Lakeview Closed Loan, continued

2. Click **Deliver Loans/TDOCS** on the left hand side navigation toolbar.
3. Click **Upload Load Images to 6033-Bayview/Lakeview CLDD**.

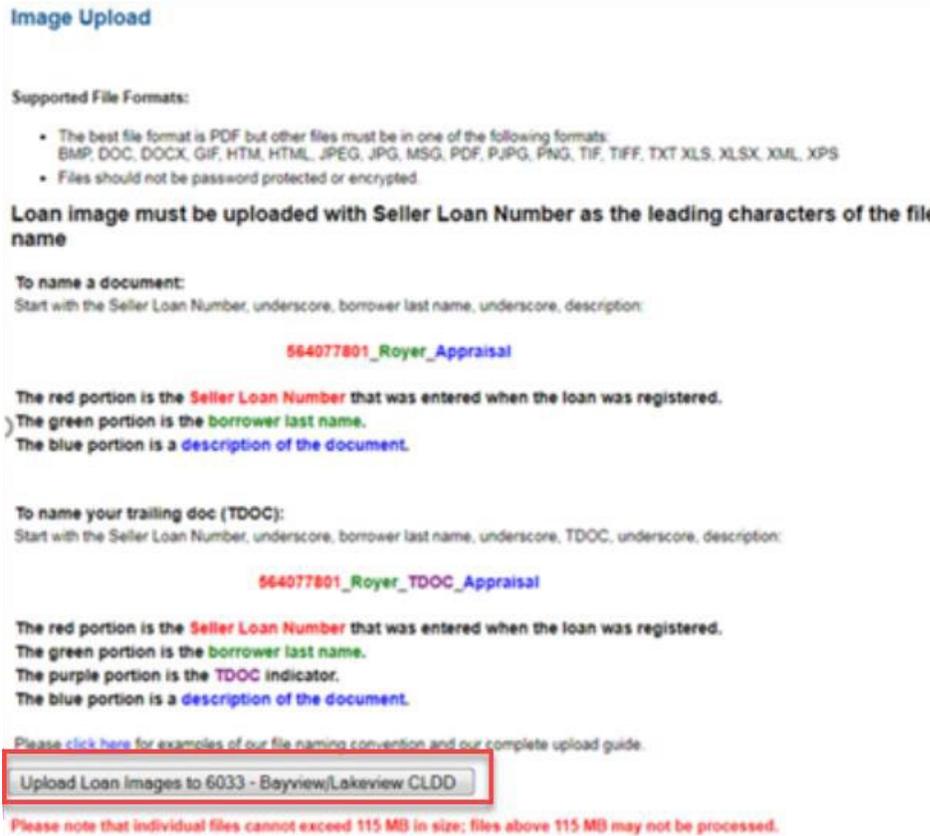


Image Upload

Supported File Formats:

- The best file format is PDF but other files must be in one of the following formats: BMP, DOC, DOCX, GIF, HTM, HTML, JPEG, JPG, MSG, PDF, PJP, PNG, TIF, TIFF, TXT, XLS, XLSX, XML, XPS
- Files should not be password protected or encrypted.

Loan image must be uploaded with Seller Loan Number as the leading characters of the file name

To name a document:
Start with the Seller Loan Number, underscore, borrower last name, underscore, description:

564077801_Royer_Appraisal

The red portion is the **Seller Loan Number** that was entered when the loan was registered.
The green portion is the **borrower last name**.
The blue portion is a **description of the document**.

To name your trailing doc (TDOC):
Start with the Seller Loan Number, underscore, borrower last name, underscore, TDOC, underscore, description:

564077801_Royer_TDOC_Appraisal

The red portion is the **Seller Loan Number** that was entered when the loan was registered.
The green portion is the **borrower last name**.
The purple portion is the **TDOC indicator**.
The blue portion is a **description of the document**.

Please [click here](#) for examples of our file naming convention and our complete upload guide.

Upload Loan Images to 6033 - Bayview/Lakeview CLDD

Please note that individual files cannot exceed 115 MB in size; files above 115 MB may not be processed.

7. (6033) Bayview/Lakeview Closed Loan, continued

4. In the **Select files** dialog box, click **Add files** to search your computer for the required loan document(s).
5. Click **Open** once appropriate files are selected for upload.
6. When the desired document is displayed in the dialog box, click **Start upload**.

Outcome: When the document is displayed in the dialog box, click the **Start upload** button. A message appears confirming all files were uploaded



Note: To delete a document that you may have mistakenly added, click the red circle to delete it.



7. Do not close out of this window until the green light indicator appears under the Status column and the confirmation message is received. Click **OK** to close.

8. Reporting

To see the available reporting options, complete the following steps.

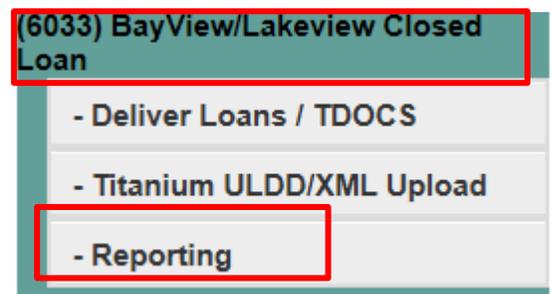
Note: Both of the following reporting links may be available depending on what your company does and the access that the web admin at your shop configured for your company.

1. Under the 3021 Bayview/Lakeview UW section, click Deliver Loans & Reporting.

Note: This applies to loans that Lakeview/Bayview are underwriting.



2. Alternatively, under the 6033 Bayview/Lakeview Closed Loans section, (for loans that are closed) click Reporting.



8. Reporting, continued

Outcome: Three standard report options under the **Reporting Tools** section and two custom report options display.

The **Reporting Tools** are:

- **Project Snapshot Summary**
- **Deficiency Details**
- **Images Not Matching/No Loan Data**

The **Custom Reports** are:

- **Report Card**
- **Purchase Advice Report**





8. Reporting, continued

Project Snapshot Summary Report

This report displays your pipeline, from initial delivery to funding.

Pipeline Snapshot Summary

Corr: Pool: Review Type: Search

Status	Loan Count	Population Amount
Correspondent Image Outstanding/ Registration Data Received	12,062	\$2,469,603,181.61
Compliance Review Assignment Pending	29	\$6,379,409.00
Compliance Review In Process	358	\$73,452,352.00
Compliance Review In Process/Hold for Images	1	\$268,780.00
Compliance Review Complete/ Credit Review Assignment Pending	172	\$48,281,755.00
Compliance Review Complete/ Credit Review In Process	21	\$5,353,964.00
Compliance Testing In Process / Credit Complete	21	\$5,384,911.00
Compliance - Suspended/ Credit - Approved	885	\$10,510,177.94
Compliance - Suspended/ Credit - Suspended	1,901	\$537,312,891.30
Approved Pending First Lien Approval	167	\$1,763,268.85
Approved for Funding	150	\$33,972,087.04
Approved / Data Perfection In Process	1	\$284,905.00
Post Purchase Suspended	60	\$16,481,601.00
Withdrawn/Denied/Cancelled	25,516	\$5,262,187,151.49
Error	1	
Funding In Process	316	\$73,880,237.88
	Count: 356,989	Sum: \$87,753,445,882.15





8. Reporting, continued

Seller Image Files Not Matching Report

This report displays any files that were not named or uploaded properly. For example, if the Seller submitted file/files with the incorrect naming convention, the files would fail matching up with registration date.

Reports Menu

**SELLER LOAN NUMBER MATCH CANNOT BE FOUND -
ITEM CANNOT BE ROUTED TO AUDIT OR CONDITION CLEARING**

[Refresh Report](#) [Get In Excel](#)

Image ID	Corr ID	Corr Name	Seller Loan Number Assigned To Image	Image Named	Image Received Date	Uploaded By
359489	1	Demo	1111111111	1111111111_EPPERSON_VOE - Copy_152850.pdf	1/27/2014 3:23:52 PM	Test Bayview
359490	1	Demo	1111111111	1111111111_EPPERSON_Title Commitment-12 Month Chain Of Title(2)_152850.tif	1/27/2014 3:24:00 PM	Test Bayview
359491	1	Demo	1111111111	1111111111_Title Commitment-12 Month Chain Of Title_152858.tif	1/27/2014 3:24:00 PM	Test Bayview
359492	1	Demo	2222222222	2222222222_EPPERSON_VOE_152858.pdf	1/27/2014 3:24:00 PM	Test Bayview
359494	1	Demo	1111111111	1111111111_EPPERSON_VOE - Copy_132108.pdf	3/10/2014 1:15:27 PM	Correspondent Demo

Deficiency Details Report

Use this report to view suspense items. Enter a **Start Date** and **End Date** to search and click **Export** to view the report in an Excel format.

Deficiency Details - Export

Correspondent:

Deficiency Status:

Start Date:

End Date:

[Export](#)





8. Reporting, continued

Report Card

The Report Card displays historical data relating to locks, purchases, cancellations, pull through rate and FICO and LTV details.

Lender Report Card

Client ID: [REDACTED] Address: [REDACTED] Phone: [REDACTED] Fax: [REDACTED] Status: Active

UNDERWRITING APPROVAL:
 Conforming: Delegated
 Non-Conforming: Delegated
 Portfolio: Not Approved
 FHA: Delegated
 VA: Delegated

PRODUCTION SUMMARY - LOCKS						
Product Group	BEST EFFORT		BULK MANDATORY		Total	
	Current Month	Year-to-Date	Current Month	Year-to-Date		
#	Dollars	#	Dollars	#	Dollars	
Conforming	4	592,844	7	1,209,878	11	1,802,722
Government	14	2,803,331	28	6,708,981	42	9,512,312
Portfolio	51	48,795,743	62	84,243,751	113	133,039,494
WAMPFC 2nd	2	29,063	2	29,063	4	58,126
Totals	71	51,200,781	129	92,280,653	200	143,481,434

BEST EFFORT FULL THROUGH (%)			
Product Group	Lock #	Fund #	%
Conforming	12	5	41.67%
Government	35	17	48.57%
Portfolio	62	21	25.61%
WAMPFC 2nd	3	1	33.33%
Totals	112	44	39.29%

YEAR-TO-DATE PURCHASES BY STATE			
State	#	Dollars	%
CA	19	13,030,818	38.81%
FL	17	6,322,888	17.99%
IL	4	3,115,000	8.47%
MA	2	2,697,000	7.46%
WA	3	2,438,800	6.62%
TX	17	2,250,362	6.19%
NY	1	1,240,000	3.37%
NJ	2	955,684	2.63%
MI	1	897,450	2.52%
AL	1	745,900	2.05%
All Others	8	2,795,528	7.65%
Totals	100	33,579,387	100.00%

PRODUCTION SUMMARY - PURCHASES						
Product Group	BEST EFFORT		BULK MANDATORY		Total	
	Current Month	Year-to-Date	Current Month	Year-to-Date		
#	Dollars	#	Dollars	#	Dollars	
Conforming	2	679,000	3	975,723	5	1,654,723
Government	5	1,273,669	14	3,422,895	19	4,696,564
Portfolio	11	11,412,850	27	24,658,290	38	36,071,140
WAMPFC 2nd	0	0	0	0	0	0
Totals	18	13,365,519	44	29,064,708	62	42,430,227

BEST EFFORT FULL THROUGH (%)			
Product Group	Lock #	Fund #	%
Conforming	2,975,354	1,484,439	49.90%
Government	8,843,690	4,588,580	52.00%
Portfolio	77,319,540	20,479,450	26.49%
WAMPFC 2nd	48,808	19,441	39.79%
Totals	89,176,392	26,581,909	29.81%

PURCHASES HISTORY		
Year	Locks	Dollars
Current Year	18	38,775,307
Prior Year	1,182	372,344,096

PRODUCTION SUMMARY - CANCELLATIONS						
Product Group	BEST EFFORT		BULK MANDATORY		Total	
	Current Month	Year-to-Date	Current Month	Year-to-Date		
#	Dollars	#	Dollars	#	Dollars	
Conforming	1	214,272	2	389,373	3	603,645
Government	5	1,853,820	7	1,581,054	12	3,434,874
Portfolio	10	10,860,750	28	26,144,548	38	37,005,298
WAMPFC 2nd	0	0	0	0	0	0
Totals	16	12,928,842	37	28,115,015	53	40,043,857

Purchase Advice Report

The Purchase Advice Report displays loans that were purchased and the loan level details relating to those purchases.

Note: To find purchase advice, enter a start and date to search and click **Get Purchase Advice**.

Lakeview LOAN SERVICING | BAYVIEW ACQUISITIONS, LLC.

Purchase Advice Report

Start Date: End Date:

[Get Purchase Advice](#) [Get In Excel](#) [Print Preview](#) [Clear](#)

- Main
- Loan Registration/Lock/Pricing
- Current Rate Sheet
- 6033) BayView/Lakeview Closed Loan
 - Deliver Loans / TDOCS
 - Titanium ULDD/XML Upload
 - Reporting
- Announcements
- Product Matrices and Resources - Bayview

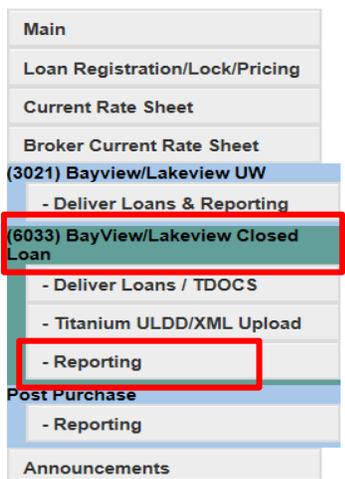


9. Loan Search

1. Use the **Search** feature to look for a particular loan.
2. To access the **Search** feature in the **3021 Bayview/Lakeview UW** (for loans you want us to underwrite for you) click **Deliver Loans & Reporting**.

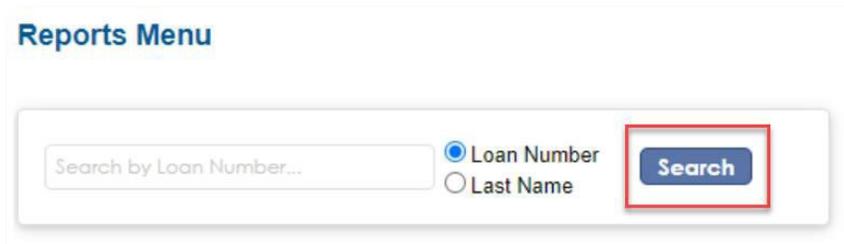


3. Alternatively, under the **6033 Bayview/Lakeview Closed Loans** (for loans that are closed) click **Reporting**.



The **Loan Search** section is shown below:

4. Enter the **Seller Loan Number** or the **Lakeview Loan Number** to search for a particular loan and click **Search**.





10. Announcements

1. Click **Announcements** on the left navigation in the **Main** screen of the system, to return to the **Announcements** screen. (They are listed in alphabetical order.)

Announcements

Descriptions	Last Update
C2021-07 - VA Product Expansion, Agency, metroexpansion, USDA	2/18/2021 9:40:22 AM
2021 All Announcements	2/18/2021 8:48:12 AM
C2021-06 - Community Loan Servicing LLC - Servicing Address Updates	2/10/2021 9:00:05 AM
C2021-05 - DACA Update, metroDPA expansion and Post Funding Adjustments	2/4/2021 9:22:28 AM
C2021-04 South Carolina Housing and 4506-C Update	1/28/2021 7:15:17 AM
C2021-03 - IRS Tax Return and Transcript Requirements, FNMA and FHA Updates	1/22/2021 4:08:11 PM
COVID-19-07 FAQs	1/13/2021 8:42:01 AM
C2021-02 - Jumbo Product Expansions and Updates	1/13/2021 8:42:01 AM
C2021-01 - FHA and Freddie Mac Updates	1/13/2021 8:42:01 AM
2020 All Announcements	12/30/2020 6:47:21 AM
2019 All Major Disaster Announcements	1/9/2020 10:46:30 AM
2019 All Announcement	12/19/2019 7:35:39 AM
2019 All Bayview Announcements	1/3/2019 3:10:13 PM

* Documents in PDF format require Adobe PDF Reader to view.





11. Product Matrix Documents

1. Select the applicable **Product Matrix** to view a list of all products and their corresponding matrices.
 - **Product Matrices and Resources – Bayview:** Contains the Jumbo matrices and information
 - **Product Matrices and Resources – Lakeview:** Contains the Agency and Government matrices and information
 - **Product Matrices – Lakeview Affordable Lending:** Contains the HFA program matrices and information

Current Rate Sheet
Broker Current Rate Sheet
(3021) Bayview/Lakeview UW
- Deliver Loans & Reporting
(3031) Bayview/Lakeview Wholesale
- Deliver Loans & Reporting
Announcements
Product Matrix Documents
Origination Guides
Exclusionary List
Services Ordering
Reference Library
(6033) BayView/Lakeview Closed Loan
- Deliver Loans / TDOCs
- Titanium ULDD/XML Upload
- Reporting
(6034) BayView/Lakeview MSR
- Deliver Loans / TDOCs
- Reporting
Announcements
Product Matrices and Resources - Bayview
Product Matrices and Resources - Lakeview
Product Matrices - Lakeview Affordable Lending
Seller Guides
Exclusionary List





11. Product Matrix Documents, continued

Product Matrices and Resources - Bayview

Descriptions	Last Update
All Matrices	2/24/2021 3:05:29 PM
_Bayview Jumbo Plus Non-QM	2/24/2021 2:58:48 PM
_Bayview Jumbo Plus QM	2/24/2021 2:55:16 PM
_Bayview Jumbo QM	2/24/2021 2:45:58 PM
_Bayview Fannie Mae Conforming and High Balance	2/24/2021 10:49:07 AM
_Bayview Freddie Mac Conforming and Super Conforming	2/24/2021 10:49:07 AM
_CLS Fannie Mae and Freddie Mac Overlay Matrix	2/24/2021 10:48:08 AM
_Bayview Jumbo Non-QM	2/24/2021 10:47:15 AM
_Titanium CLS Fannie Mae and Freddie Mac Overlay	2/24/2021 10:47:14 AM
Special Products Seller Guide	2/24/2021 10:47:14 AM
_Bayview Jumbo Products At-A-Glance	2/24/2021 10:47:14 AM
_Jumbo Single Loan Variance Request Form	2/24/2021 10:47:14 AM
_Clear Capital New Client Form	2/24/2021 10:47:14 AM
_Borrower Financial Attestation - Sample Form	2/24/2021 10:47:14 AM

* Documents in PDF format require Adobe PDF Reader to view.

Product Matrices and Resources - Lakeview

Descriptions	Last Update
_Residency and Eligibility Guide	2/4/2021 8:43:08 AM
_Correspondent Lakeview Overlay Matrix	2/18/2021 8:55:37 AM
All Matrices	2/18/2021 8:56:14 AM
Fannie Mae Conforming and High Balance	2/18/2021 8:56:21 AM
Fannie Mae HomeReady	2/18/2021 8:56:26 AM
FHA Mortgage Program	2/18/2021 8:56:31 AM
FHA Streamline	2/18/2021 8:56:35 AM
Freddie Mac Conforming and Super Conforming	2/18/2021 8:56:40 AM
Freddie Mac Home Possible	2/18/2021 8:56:46 AM
Lakeview Titanium Overlay Matrix	2/18/2021 8:56:57 AM
_Texas Section 50.(a)(6) Refinance	2/18/2021 8:57:02 AM
_USDA Guaranteed Rural Housing Program	2/18/2021 8:57:07 AM
_VA Interest Rate Reduction Refinance Program	2/18/2021 8:57:12 AM
_VA Standard Loan Program	2/18/2021 8:57:21 AM

* Documents in PDF format require Adobe PDF Reader to view.

Product Matrices - Lakeview Affordable Lending

Descriptions	Last Update
_Residency and Eligibility Guide	3/4/2021 8:09:40 AM
_Cal HFA Conventional Loan Program	3/4/2021 8:09:45 AM
_Cal HFA Government Program	3/1/2021 6:47:19 AM
_DC HFA Conventional	3/4/2021 8:09:49 AM
_DC HFA Government	2/18/2021 8:02:13 AM
_DSHA 203(k) Program Approved Lenders Only	7/9/2020 2:00:35 PM
_DSHA Conventional Program	2/18/2021 8:14:20 AM
_DSHA Government Program	2/18/2021 8:14:50 AM
_Home in Five Conventional	3/4/2021 8:12:21 AM
_Home in Five Government	2/18/2021 8:15:30 AM
_metroDPA Conventional	3/4/2021 8:12:25 AM
_metroDPA Government	2/18/2021 8:25:58 AM
_SC Housing Conventional	3/4/2021 8:12:28 AM
_SC Housing Government	2/18/2021 8:26:24 AM
_TSAHC Conventional Program	3/4/2021 8:12:31 AM
_TSAHC Government Loan Program	2/18/2021 8:26:50 AM
_WSHFC Government Loan Program	2/18/2021 8:27:13 AM

* Documents in PDF format require Adobe PDF Reader to view.





12. Seller Guides

The seller guides provide a comprehensive look at Bayview-Lakeview’s rules, seller eligibility, representations, warranties, defaults, remedies, early payoff, terms of use and electronic services.

1. Select the **Special Products Seller Guide** for non-agency product details and select **Lakeview Seller Guide** for agency and government details.

Current Rate Sheet
Broker Current Rate Sheet
(3021) Bayview/Lakeview UW
- Deliver Loans & Reporting
(3031) Bayview/Lakeview Wholesale
- Deliver Loans & Reporting
Announcements
Product Matrix Documents
Origination Guides
Exclusionary List
Services Ordering
Reference Library
(6033) BayView/Lakeview Closed Loan
- Deliver Loans / TDOCs
- Titanium ULDD/XML Upload
- Reporting
(6034) BayView/Lakeview MSR
- Deliver Loans / TDOCs
- Reporting
Announcements
Product Matrices and Resources - Bayview
Product Matrices and Resources - Lakeview
Product Matrices - Lakeview Affordable Lending
Seller Guides
Exclusionary List

Seller Guides

Descriptions	Last Update
Special Products Seller Guide	2/11/2021 12:46:43 PM
Lakeview Seller Guide	2/4/2021 8:24:55 AM

* Documents in PDF format require Adobe PDF Reader to view.





13. Exclusionary Lists

- Click **Exclusionary List** to view a combination of the **FHFA Exclusionary List (Federal Housing Finance Agency)** and the **Lakeview Exclusionary List** to view all individuals and business names for which are not eligible for purchase.

Current Rate Sheet
Broker Current Rate Sheet
(3021) Bayview/Lakeview UW
- Deliver Loans & Reporting
(3031) Bayview/Lakeview Wholesale
- Deliver Loans & Reporting
Announcements
Product Matrix Documents
Origination Guides
Exclusionary List
Services Ordering
Reference Library
(6033) BayView/Lakeview Closed Loan
- Deliver Loans / TDOCS
- Titanium ULDD/XML Upload
- Reporting
(6034) BayView/Lakeview MSR
- Deliver Loans / TDOCS
- Reporting
Announcements
Product Matrices and Resources - Bayview
Product Matrices and Resources - Lakeview
Product Matrices - Lakeview Affordable Lending
Seller Guides
Exclusionary List

Exclusionary List

Descriptions	Last Update
Bayview/Lakeview Exclusionary List	2/12/2021 12:36:57 PM

* Documents in PDF format require Adobe PDF Reader to view.





14. Reference Library

1. Click the **Reference Library** to view many helpful documents, forms, and guides.

Reference Library	
Descriptions	Last Update
Quick Reference Guide for Originators- Lakeview Agency Loans	6/7/2017 11:45:46 AM
Originator Fee Schedule	9/2/2015 11:56:54 AM
Bayview Portfolio Asset Inclusion Worksheet	8/11/2015 3:12:36 PM
Eligibility Submission Checklist - Lakeview Agency	8/7/2015 1:32:46 PM
Eligibility Submission Checklist - Bayview Portfolio	8/7/2015 1:31:56 PM
Loan Attestation/Borrower Certification Letter	7/29/2015 12:56:11 PM
Bayview Portfolio Scenario Worksheet	6/16/2015 3:49:56 PM
Broker Commitment Quick Reference Guide	6/10/2015 6:31:45 PM
Lakeview Agency Scenario Worksheet	4/2/2015 8:29:29 AM
Washington Availability of Appraisal or Other Loan Valuation Documents Disclosure	4/1/2015 2:43:17 PM
Missouri Broker and Fee Agreement	3/25/2015 3:16:09 PM
Condo Questionnaire – Conventional Limited Review	3/19/2015 10:31:27 AM
Bayview Portfolio Residual Income Worksheet	3/15/2015 5:00:13 PM
Conventional PUD Questionnaire	2/23/2015 11:03:44 AM
DO and LP Sponsorship	2/12/2015 8:52:20 AM
File Upload Utility	2/12/2015 8:52:20 AM
E-Signing FAQs for initial disclosures - Bayview	1/30/2015 3:02:40 PM
E-Signing Instructions for Initial Disclosures	1/30/2015 3:02:01 PM





15. Training Resources

1. **Training Resources** contains training materials, including product overviews and job aids such as this one.

Product Matrices and Resources - Bayview
Product Matrices and Resources - Lakeview
Product Matrices - Lakeview Affordable Lending
Seller Guides
Exclusionary List
Reference Library
Training Resources
User Profile
Logout

Training Resources

Descriptions	Last Update
Correspondent Pricing Job Aid	10/14/2019 7:48:48 AM
Correspondent Website Job Aid	10/14/2019 7:49:30 AM
Home in Five - Submitting, Pricing, and Locking a Loan Job Aid	5/6/2020 7:31:02 AM
Home in Five -Pricing and Locking a Loan Video	1/7/2020 10:35:30 AM
How to Name and Upload Documents in MRN	10/14/2019 7:51:20 AM
Jumbo Overview	2/26/2021 12:58:32 PM
Jumbo QM Overview	2/26/2021 12:58:49 PM
Jumbo Underwriting	2/26/2021 12:59:15 PM
Jumbo Underwriting QM Only	2/26/2021 12:59:39 PM
Jumbo Underwriting Video	10/22/2020 2:23:12 PM
Locking a First Loan with a Paired Second in the Lakeview Client Site Video	2/4/2020 12:08:31 PM
metroDPA - Program Overview	2/22/2021 12:39:03 PM
metroDPA/denverDPA - Submitting, Pricing, and Locking a Loan Job Aid	1/7/2020 10:35:30 AM
metroDPA/denverDPA Program Training Video	12/17/2019 10:04:39 AM
Naming and Uploading Documents	11/19/2020 7:25:56 AM
Naming Conventions for Document Upload	2/18/2021 2:21:29 PM
Registering Pricing and Locking Loans	11/18/2020 1:33:22 PM
South Carolina Housing - Delivering Loans	2/10/2021 12:57:18 PM
South Carolina Housing - Product Overview	2/25/2021 12:05:56 PM
Web Admin Job Aid	10/14/2019 7:44:32 AM

* Documents in PDF format require Adobe PDF Reader to view.

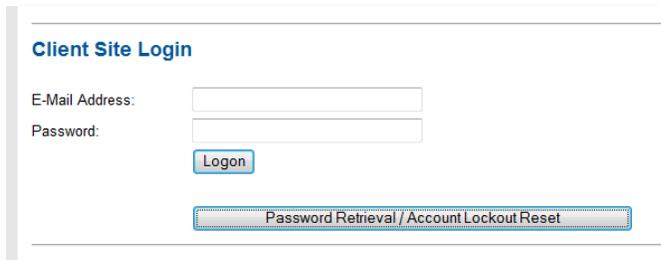


16. User Profile

Every user of the system has access to the User Profile.

1. Click Password Retrieval / Account Lockout Reset to change your password.

Note: Passwords expire every 90 days; Users will be required to reset their password every 90 days. Users will be prompted prior to the actual expiration date to change their password.



The image shows a 'Client Site Login' form. It has two input fields: 'E-Mail Address:' and 'Password:'. Below the 'Password:' field is a 'Logon' button. At the bottom of the form is a button labeled 'Password Retrieval / Account Lockout Reset'.

Note: Make a note of your password as they are not stored in the system.

2. Type in the current password in the **Current Password** field.
3. Type in your new password in the **New Password** field.
4. Type in the new password again under **Confirm New Password** field.
5. Click **Reset Password**.



The image shows a 'User Profile' form. It displays 'Logged in Name:' followed by a blurred name. Below that is 'Company:' with the value 'Bayview'. There are three input fields: 'Current Password:', 'New Password:', and 'Confirm New Password:'. At the bottom is a button labeled 'ResetPassword' with a red border.



17. Logout

1. Click the **Logout** on the left navigation to fully exit the client site.

