

Lakeview Loan Servicing, LLC

Correspondent Lender Reference Guide

Naming and Uploading Documents

Table of Contents

- 1. Naming File Documents..... 3
 - Important Notes 3
 - File Naming Convention 4
 - Tips for naming files 5
 - Examples of invalid file names:..... 5
- 2. How to Upload Documents to 3021 Bayview/Lakeview UW 6
- 3. How to Upload Documents to 6033 Bayview/Lakeview Closed Loan..... 8
- 4. Trailing Documents.....10
 - When uploading conditions (all trailing documents):10
- 5. How to Upload Trailing Documents (TDOCs).....11

1. Naming File Documents

Important Notes

- Our system requires the use of a unique loan number or file number. In the system, this appears as the **Seller Loan Number**.
- The loan number or file number cannot be repeated on subsequent loans; it must be unique per each loan file.
- Our system will also assign the file a loan number, but you must use your **Seller Loan Number** when searching for your loans.
- After the **Seller Loan Number** is determined and entered, it is imperative that the person who uploading the loan file documents uses the exact same **Seller Loan Number** to begin the file name for the document.

Note: You must have a loan file numbering system before the loan file is registered and uploaded on our system.

- See below for three suggestions if your shop does not have a numbering system in place.

▪ Enter the Seller Loan Number when the loan is registered

Suggestions:

- Use the Loan Origination System assigned number.

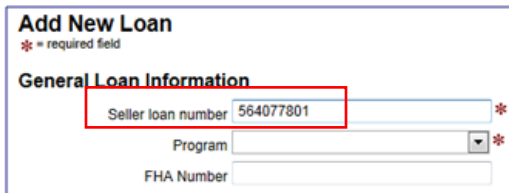
Example: 564077801

- Use the AUS number assigned to your loan.

Example: 009711757

- House number and street name with NO spaces.

Example: 8153MapleCourt



DO NOT USE “UNASSIGNED” , “TBD” , or all zeroes (000000) for the Seller Loan Number as your loan WILL NOT move into Underwriting.

The Seller Loan Number has to be unique to loan file and CANNOT be used again on another loan.

1. Naming File Documents, continued

File Naming Convention

It is imperative that you follow our naming convention before uploading your files. This ensures they are properly matched to their parent loan.

Bayview-Lakeview Loan Documents-Naming Conventions

The person who will upload the documents will need to ALSO use the exact same previously entered Seller Loan Number to begin the file name. This will insure that the documents will be properly and correctly tied to the loan.

Example of loan document file names:

564077801_Royer_Submission

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**.

Note that each section is separated by an underscore, NOT a space or a dash/hyphen. You need to use an underscore.

If the Seller Loan Number is not the same in the document file name, your documents will not correctly be tied to the loan file.

1. Naming File Documents, continued

Tips for naming files

- To separate information, use an underscore (_), not a dash or hyphen.

Note: Underscores should never be part of the loan number portion of the file name.

- Do not include any special characters in the file name (e.g. `~!@#\$%^&*()+ = / \ , < > ? " ').
- A period (.) should only be used once at the end as a part of the file extension (ex: .pdf, .jpg).

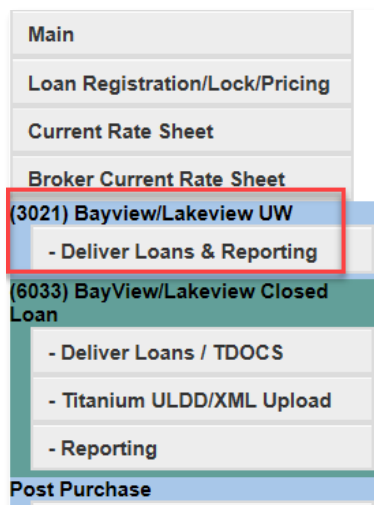
Examples of invalid file names:

- 2741 8158_Jones _Closing Pkg.pdf (spaces in file name)
- 27418153 Jones ClosingPkg.pdf (no underscore after loan number, just a space)
- 27418153_Jones_ClosingPkg#2.pdf (special character used)
- 27418153.Jones_ClosingPkg.pdf (extra period in file name)

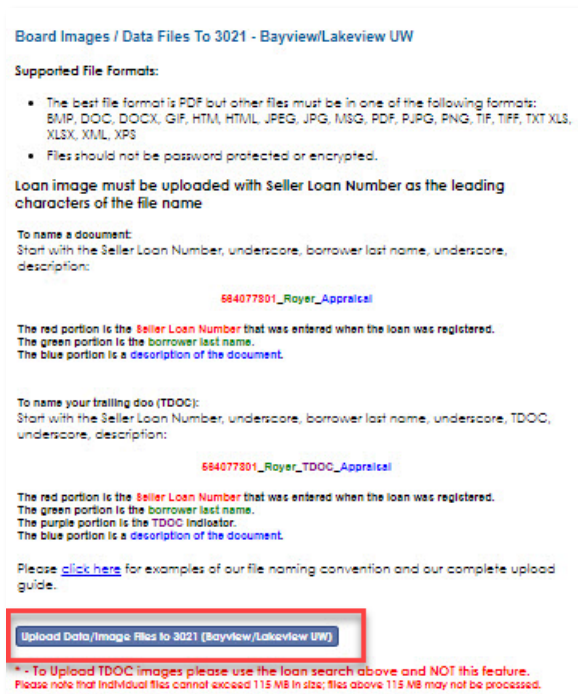
2. How to Upload Documents to 3021 Bayview/Lakeview UW

Use the link under **(3021) Bayview/Lakeview UW** to upload files for loans Lakeview needs to underwrite.

1. On the left navigation pane, click on the Deliver Loans & Reporting link under **(3021) Bayview/Lakeview UW**.

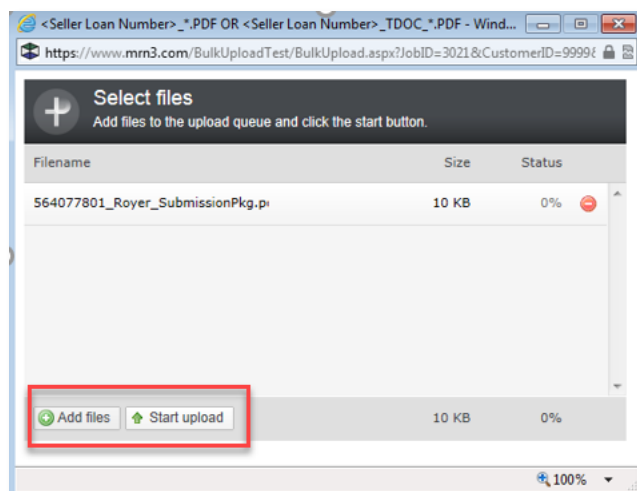


2. Click Upload Data/Image Files to 3021 (Bayview/Lakeview UW).

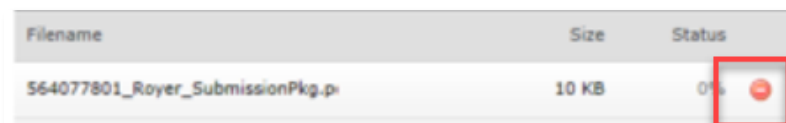


2. How to Upload Documents to 3021 Bayview/Lakeview UW, continued

3. In the **Select files** dialog box, click **Add files** to search your computer for the loan document(s) to upload.
4. Click **Open** once the appropriate files are selected for upload.
5. When the desired document is displayed in the dialog box, click **Start Upload**. A message will appear confirming all files were uploaded.

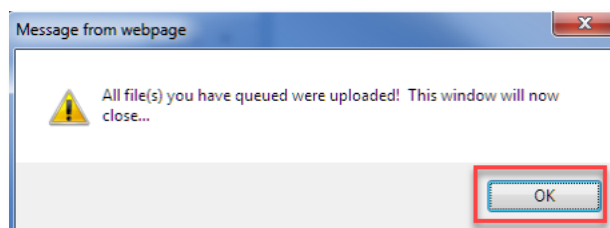


Note: To delete a document that may have mistakenly added, click the red circle to delete it.



Note: Do not close out of **Select Files** window until the green light indicator appears under the **Status** column and the confirmation message appears. Once the indicator appears, click **OK** to close it.

6. Click **OK** to close the window.



Note: Upload times will vary depending on file size and your internet upload speed (your upload speed can be slower than your download speed). A typical 300 page/25mb file will upload in roughly one minute.

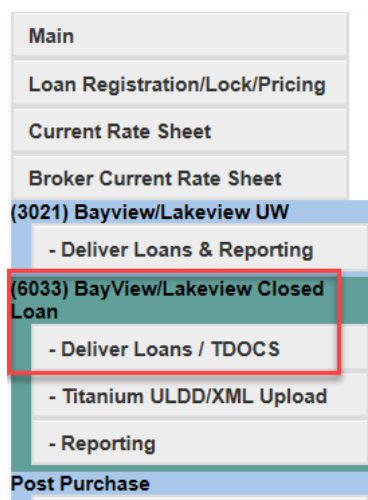
3. How to Upload Documents to 6033 Bayview/Lakeview Closed Loan

Use the link under **(6033) Bayview/Lakeview Closed Loan** to upload loan documents for closed loans.

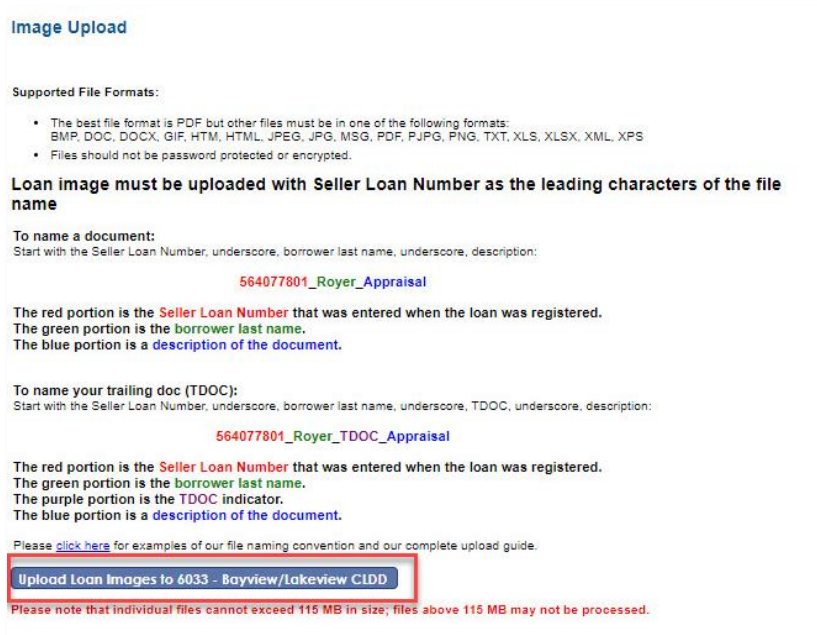
Note: If the loan was previously underwritten by Lakeview, upload only the closed loan package to this folder.

- If the loan was underwritten by you as a delegated Seller, upload both the credit and closing packages to this folder.

7. On the left navigation pane, click **Deliver Loans/TDOCS**.

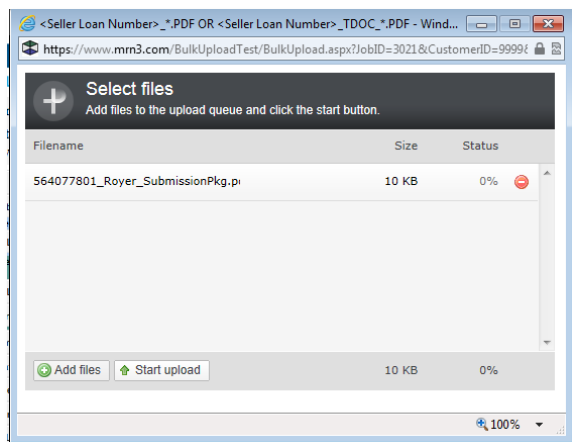


8. Click Upload Load Images to 6033-Bayview/Lakeview CLDD.

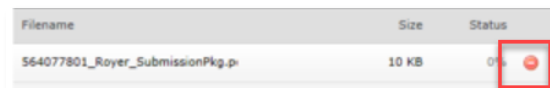


3. How to Upload Documents to 6033 Bayview/Lakeview Closed Loan, continued

9. In the **Select files** dialog box, click **Add files** to search your computer for the loan document(s) to upload.
10. Click **Open** once appropriate files are selected.
11. When the document is displayed in the dialog box, click **Start Upload**. A message will appear confirming all files were uploaded.

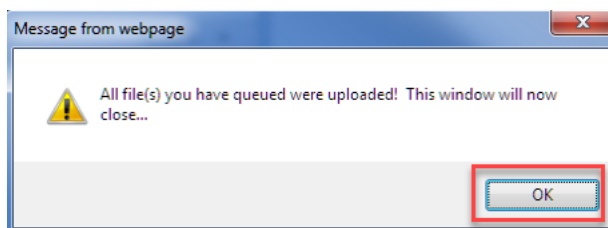


Note: To delete a document that may have mistakenly added, click the red circle to delete it.



Note: Do not close out of the **Select Files** window until the green light indicator appears under the **Status** column and the confirmation message. Once the indicator appears, click **OK** to close it.

12. Click **OK** to close the window.



Note: Upload times will vary depending on file size and your internet upload speed (your upload speed can be slower than your download speed). A typical 300 page/25mb file will upload in roughly one minute.

4. Trailing Documents

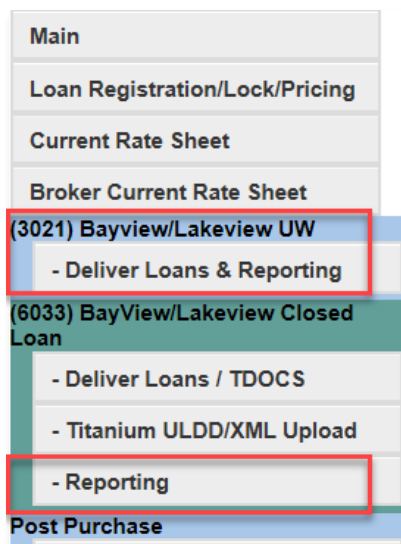
After the initial documents are uploaded, any other remaining document is considered to be a “trailing document”, or TDOC.

When uploading conditions (all trailing documents):

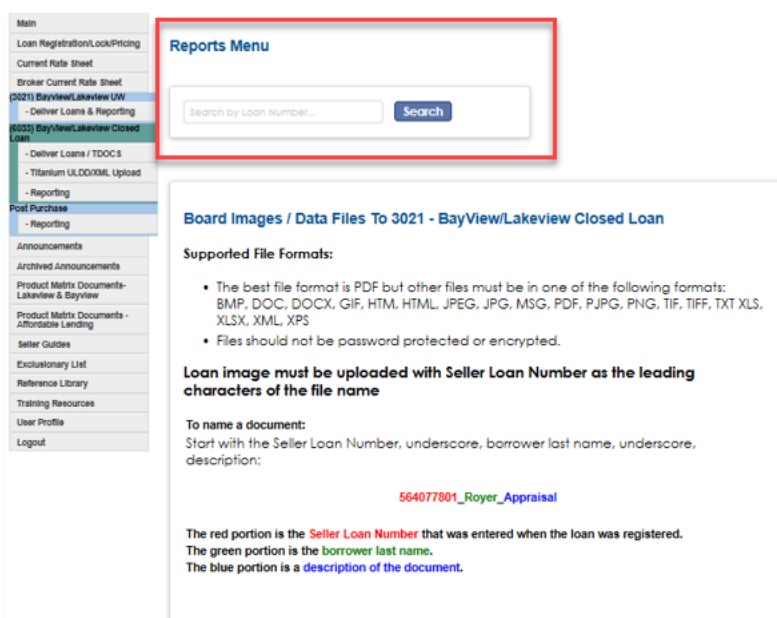
- Follow the naming conventions, using the same file naming sequence.
- Files should be named with “_TDOC” behind the loan number and a description of the document.
 - Examples:
 - 27418153_Jones_TDOC_Appraisal.doc
 - 27418153_Jones_TDOC_TaxForm.pdf
- Using *TDOC* in the name of the document allows the system to recognize the additional documents as items for clearing conditions of the loan.

5. How to Upload Trailing Documents (TDOCs)

1. On the left navigation, click **Deliver Loans & Reporting** under **(3021) Bayview/Lakeview UW** or click **Reporting** under **(6033) Bayview/Lakeview Closed**.

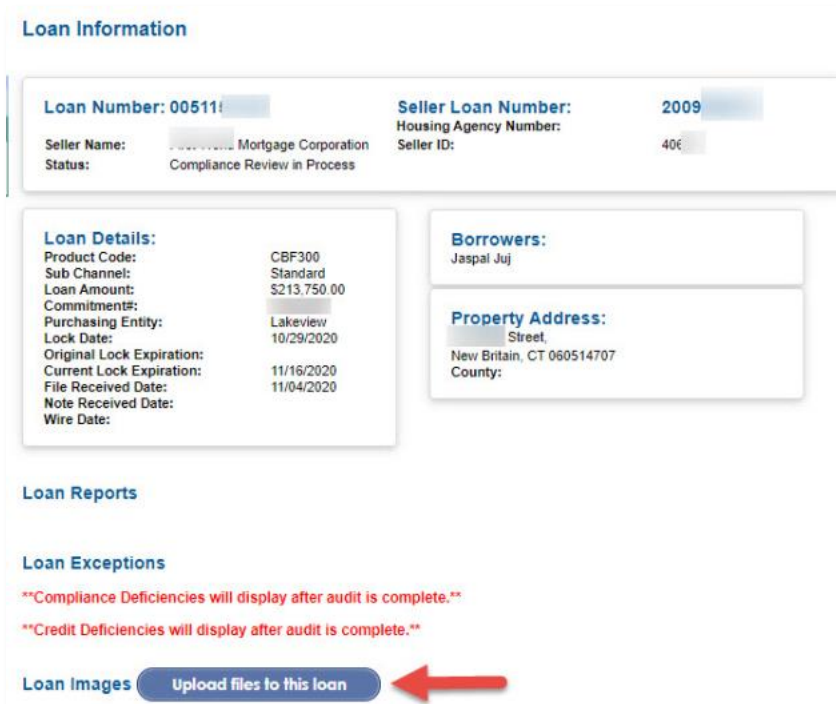


2. Enter your **Seller Loan Number** to search for a particular loan and click **Search**.



5. How to Upload Trailing Documents (TDOCs), continued

3. Scroll down to locate and click the **Upload TDOC Files (to THIS loan)** link.



Loan Information

Loan Number: 005111	Seller Loan Number: 2009
Seller Name: [REDACTED] Mortgage Corporation	Housing Agency Number:
Status: Compliance Review in Process	Seller ID: 406

Loan Details:

Product Code:	CBF300
Sub Channel:	Standard
Loan Amount:	\$213,750.00
Commitment#:	
Purchasing Entity:	Lakeview
Lock Date:	10/29/2020
Original Lock Expiration:	11/16/2020
Current Lock Expiration:	11/04/2020
File Received Date:	11/04/2020
Note Received Date:	
Wire Date:	

Borrowers:

Jaspal Juj

Property Address:

Street,
New Britain, CT 060514707
County:

Loan Reports

Loan Exceptions

****Compliance Deficiencies will display after audit is complete.****

****Credit Deficiencies will display after audit is complete.****

Loan Images [Upload files to this loan](#)

5. How to Upload Trailing Documents (TDOCs), continued

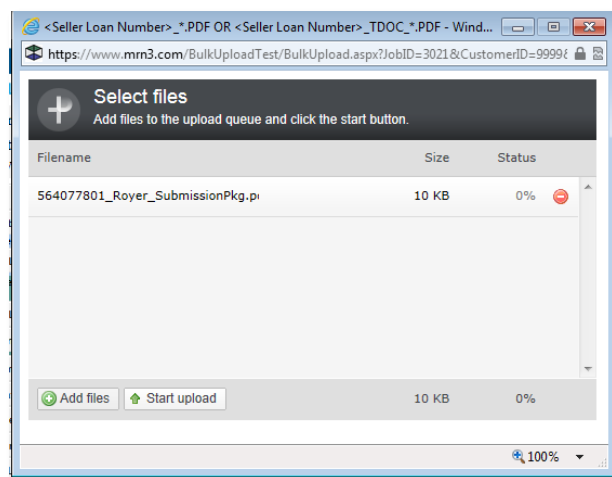
After clicking **Upload TDOC Files (to THIS loan)**, the **Select Files** dialog box displays.

4. In the **Select files** dialog box, click **Add files** to search your computer for the desired loan document(s) to upload.

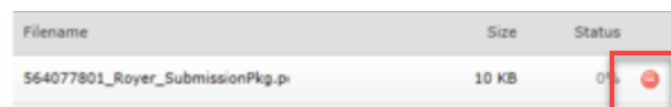
5. Click **Open** once the appropriate files are selected.

Outcome:

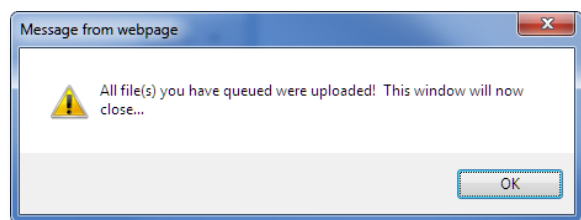
6. When the document is displayed in the dialog box, click **Start Upload**. A message will appear confirming all files were uploaded.



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



7. Do not close out of the **Select Files** window until the green light indicator under the **Status** column and the confirmation message. Once the indicator appears, click **OK** to close it.



8. Click the **Refresh** icon and the TDOCS appear immediately.