

Lakeview

Correspondent Non-Delegated Portal Reference Guide

Managing Conditions

Lakeview Loan Servicing Proprietary and Confidential Orig: May 6, 2022_JC Cor Non-Delegated Lender Non-Del Portal - Managing Conditions Page 1 of 11

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Table of Contents

1.	Overview	3
2.	Features of the Conditions Screen	4
	Viewing Conditions	.5
	Export List of Conditions	6
	Printing Approval Letter	6
3.	Column Headers on the Conditions Screen	.7
4.	Uploading Document to Clear Conditions	.8
	Choose File	9
	Drag & Drop	10

Lakeview Loan Servicing Proprietary and Confidential Orig: May 6, 2022_JC Cor Non-Delegated Lender Non-Del Portal - Managing Conditions Page 2 of 11

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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, jpg, emf, and xps file formats up to 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.

Conditions			*Export al	l Conditions >	Appro	oval Letter >
	All	Prior to Approval	Prior to Fundin	g		
Status ADDED						
		Acc	eptable File Types: pdf, d	oc, docx, txt, tif, jpg, jp	eg, jpe, emf and x	ps Note: Max 100MB
Prior to 🗢 Conditions 🗢			Open/Revised	Received 🗢	Status 💠	Attach Docs

Lakeview Loan Servicing Proprietary and Confidential Orig: May 6, 2022_JC Cor Non-Delegated Lender Non-Del Portal - Managing Conditions Page 3 of 11

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2. Features of the Conditions Screen

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

- 1. Click the number in the **Conditions** column to open the loan directly to the **Conditions** dashboard.
- 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	\$ 300,0		05/18/2022	٥	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	D	9000011608		~

a. Click Conditions to navigate to the Conditions dashboard.

^{new} URLA - Loan Summary Conditions	MENU	Conditions						[*Export all C	Conditions >	Approval Let	ter >
^{new} URLA Product & Pricing ∽ Submit Credit Package		Status ADDED	All	P	Prior to Approval	Prior	to Funding	Acceptabl	e File Types: pdf, doc,	docx, txt, tif, jpg, jpeg, j	pe, emf and xps Note:	Max 100MB
View/Upload Documents		Prior to 🗢		Open/Revi	ised		Received \$		Status 💠	Attach Docs	View Docs	More
		Docs							Added	Drag & Drop or Choose File	E	×

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

• If no data is found, the message **Currently there are no conditions to view** displays.

New URLA - Loan Summary		Conditions									*Export all	Conditions >	Approval Let	ter >
new URLA					All	Prior to Appr	oval	Prior to Fur	nding					
Product & Pricing ~ Submit Credit Package	5	itatus	~							Accepta	ible File Types: pdf, doc	, docx, txt, tif, jpg, jpeg,	jpe, emf and xps Note	Max 100MB
View/Upload Documents		Prior to 🗘	Conditions 🗢	Open/Revised			Received	÷			Status 🗢	Attach Docs	View Docs	More
					Curren	tly there are no co	nditions to	view						
												Go back to	pipeline S	ubmit

Lakeview Loan Servicing Proprietary and Confidential Orig: May 6, 2022_JC Cor Non-Delegated Lender Non-Del Portal - Managing Conditions Page 4 of 11





2. Features of the Conditions Screen, continued

Viewing Conditions

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

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

MENU	Conditions		*Export all Conditions >> [篇 Approval Letter >>
		All Prior to Approval Prior to Funding	
	ADDED ~		
		Ac	cceptable File Types: pdf, doc, docx, txt, tif, jpg, jpeg, jpe, emf and xps Note: Max 100MB

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

		All	Prior to Approval	Prior to Fu	unding			
fws								
1	~							
-								
ALL				cceptable File Typ	wa pdf. doc. docs.	tvt. tif. jpg. jpeg. jpe. e	mf and sps Not	e: Max 100
ALL ADDED				cceptable File Typ	en: pdf, doc, docx,	tst, til, jpg, jpeg, jpe, e	mf and sps Not	ie: Max 100
ALL ADDED OPEN			Open/Revised	cceptable File Typ	ses: pdf, doc, docx, Status 🗣	tri, tri, jog, joeg, joe, e Attach Docs	ml and sps Not	ie: Max 100 More

3. Click the ^v icon for **Expand Details** to display the details of the condition.

Prior to 🗢	Conditions ¢	Expand details	Open/Revised	Received 🗢	Status 🗘	Attach Docs
Docs	! - CONDITIONAL APPROVAL	~			Added	Drag & Drop or Choose File

- *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.

Lakeview Loan Servicing Proprietary and Confidential Orig: May 6, 2022_JC Cor Non-Delegated Lender Non-Del Portal - Managing Conditions Page 5 of 11





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 ^v icon. Select **Open**.

	Open	
	Always oper	n files of this type
	Show in fold	ler
4	Cancel	H
बिंगे 7000417066_Ken Cxls	~	

Outcome: A file opens in Excel.

 This PC > Downloads 				
^	Name	Date modified	Туре	Size
	1000417066_Ken Customer_5_4_2021_23	5/4/2021 7:09 PM	Microsoft Excel 97	21 KB

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.

Application-In	Added Added	or Choose F
1		Drag & Dr
Conditional Approval.pdf		Show all X

Lakeview Loan Servicing Proprietary and Confidential Orig: May 6, 2022_JC Cor Non-Delegated Lender Non-Del Portal - Managing Conditions Page 6 of 11





3. Column Headers on the Conditions Screen

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

MENU	Conditions						*Export all C	conditions >	Approval Lett	er >
				All	Prior to Approval	Prior to Funding]			
	Status ADDED		~							
							Acceptable File Types: pdf, doc,	docx, txt, tif, jpg, jpeg, j	pe, emf and xps Note:	Max 100MB
	Prior to 🗢	Conditions \$			Open/Revised	Received \$	Status 🗘	Attach Docs	View Docs	More

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

Lakeview Loan Servicing Proprietary and Confidential Orig: May 6, 2022_JC Cor Non-Delegated Lender Non-Del Portal - Managing Conditions Page 7 of 11





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: Select **ADDED** or **OPEN** from the **Status** drop-down list to view only open conditions.

Conditions	(C *Export all Conditions >
Entres ADDED	All Prior to Approval Pr	rier to Funding
AII ADOED	Acceptab	ble File Types: pdl, doc, docx, txt, til, jpg, jpeg, jpe, emf and xps Note: Max 100M
FULFILLED SATISFIED	Open/Revised	Status C Attach Docs Docs More
		David David

2. Click the ^v icon to display the descriptions from Encompass.

Prior to 💠	Conditions 🗢	Open/Revised	Received 🗢	Status ≑	Attach Docs	Docs	More
Docs	619 - Anti-Steering Disclosure Required (WS)			Added	Drag & Drop or Choose File	P	Ť

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

Lakeview Loan Servicing Proprietary and Confidential Orig: May 6, 2022_JC Cor Non-Delegated Lender Non-Del Portal - Managing Conditions Page 8 of 11





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.

Docs	613 - Credit-LDP / GSA Review - Dataverify		Added	Drag & Drop
Details LLS CM to include Evidence of Clear LDP a	nd GSA for all parties In transaction. Verify all parties a	Revision Comments	Document List Click to view previously submitted documents	
Read More			View Document List	

- 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.

© Open 2				×
← × 1 📕 → This PC	C > Desktop > LoanDocuments		✓ ひ Search LoanDocumer	nts 🔎
Organize 🔻 New folder	0			- 🔳 😮
Pictures	Name	^	Date modified	Туре
📜 Uploads	🖈 🛃 Sample-Information.pdf		4/6/2021 12:39 PM	Adobe Acro
	🛃 Sample-Loan-Document	.pdf	4/6/2021 12:39 PM	Adobe Acro
E Desktop	v «			>
File name	Sample-Information.pdf		✓ All Files (*.*)	~
			4 Open	Cancel

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



Lakeview Loan Servicing Proprietary and Confidential Orig: May 6, 2022_JC Cor Non-Delegated Lender Non-Del Portal - Managing Conditions Page 9 of 11





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.

MENU	Condition Management
	\sim
	\checkmark
	Document Submission Successful. Your documents will be available to view in the More Section shortly.
	Condition Management

Drag & Drop

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

← → ~ ↑ 🖡 > This PC > Desktop > LoanDocuments			
🖕 Ouick access	^	Name	^
Desktop	*	🛃 Sample-Information.pdf	
		🛃 Sample-Loan-Document.pdf	

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

Funding	755 - Closing - Disbursement Ledger		Added	Charges Drop or Charges Allow
Docs	613 - Credit-LDP / GSA Review - Dataverify		Added	Prr _
Details		Revision Comments	Document List	
LLS CM to include Evidence of C	lear LDP and GSA for all parties In transaction. Verify all parties a		Click to view previously submitted documents	
Read More			View Document List	

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

Go back to pipeline	Submit

Lakeview Loan Servicing Proprietary and Confidential Orig: May 6, 2022_JC Cor Non-Delegated Lender Non-Del Portal - Managing Conditions Page 10 of 11





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.

MENU	Condition Management
	\bigcirc
	Document Submission Successful. Your documents will be available to view in the More Section shortly.
	Condition Management

Lakeview Loan Servicing Proprietary and Confidential Orig: May 6, 2022_JC Cor Non-Delegated Lender Non-Del Portal - Managing Conditions Page 11 of 11

