Lakeview

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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

Table of Contents

Lakeview Loan Servicing
Proprietary and Confidential
Orig: May 6, 2022_JC

Cor Non-Delegated Lender
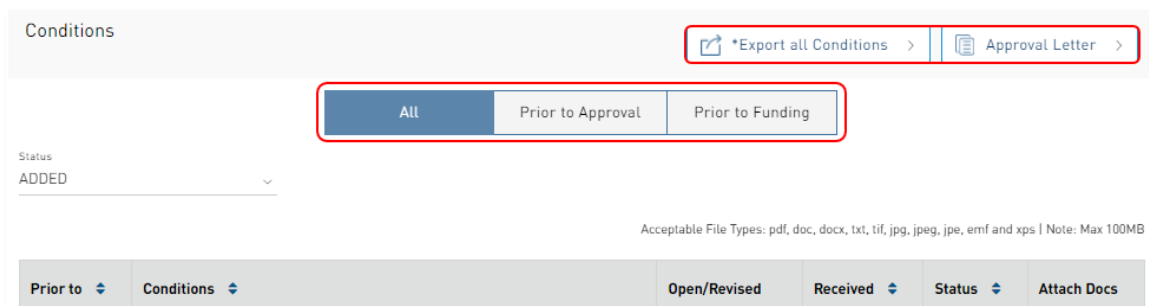Non-Del Portal - Managing Conditions
Page 2 of 11

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.

Lakeview Loan Servicing
Proprietary and Confidential
Orig: May 6, 2022_JC

Cor Non-Delegated Lender
Non-Del Portal - Managing Conditions
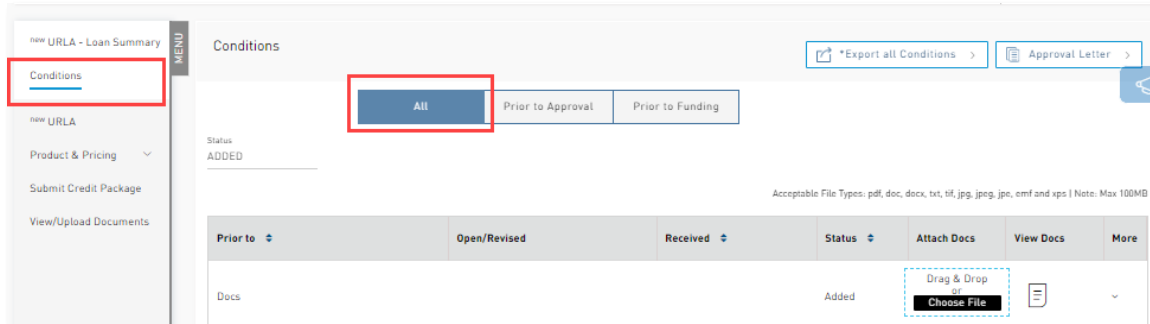Page 3 of 11

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.
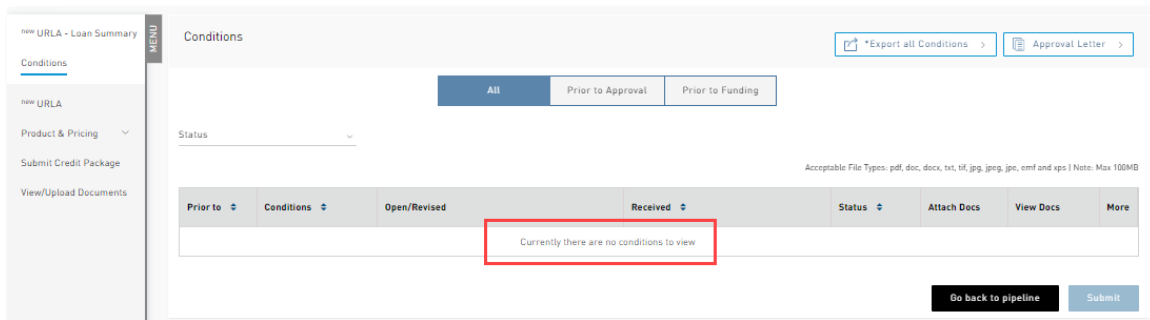

a. Click **Conditions** to navigate to the **Conditions** dashboard**.**

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.


Lakeview Loan Servicing
Proprietary and Confidential
Orig: May 6, 2022_JC

Cor Non-Delegated Lender
Non-Del Portal - Managing Conditions
Page 4 of 11

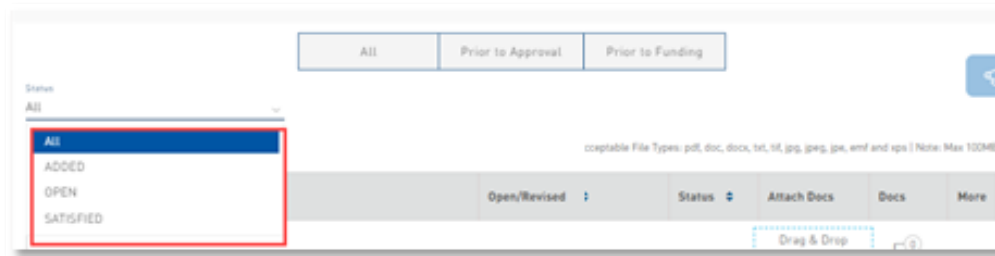## 2. Features of the Conditions Screen, continued

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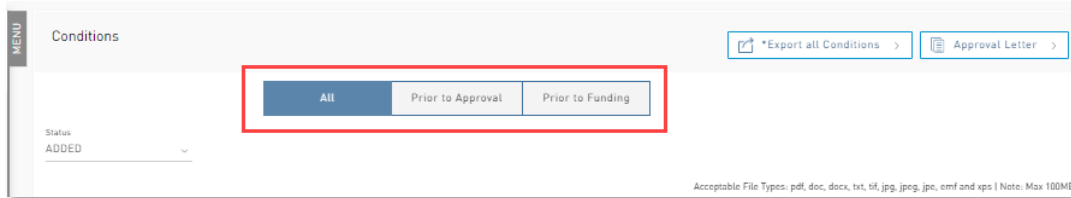
2. Filter the list by **Status** by selecting the appropriate status from the drop-down list.

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


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.
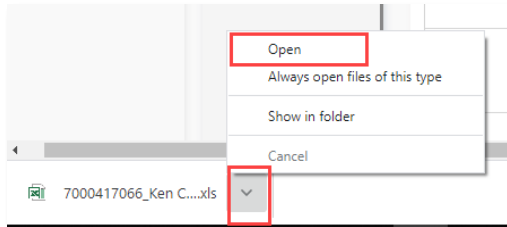
Lakeview Loan Servicing
Proprietary and Confidential
Orig: May 6, 2022_JC

Cor Non-Delegated Lender
Non-Del Portal - Managing Conditions
Page 5 of 11

2. Features of the Conditions Screen, continued
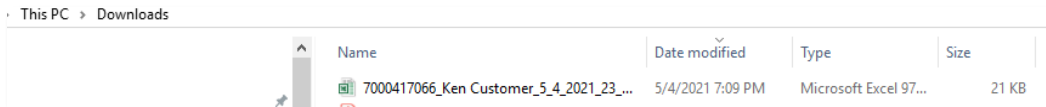
Export List of Conditions

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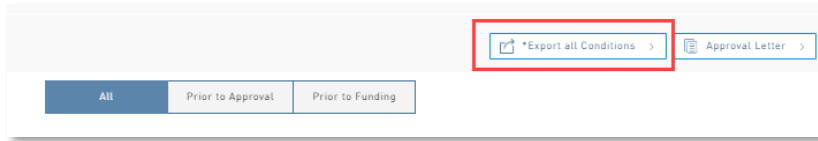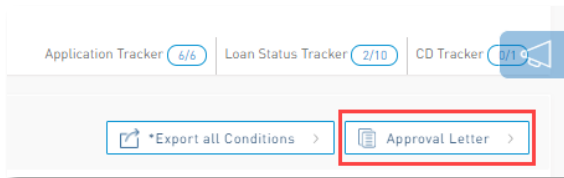

2. Click the ˅ icon. Select **Open**.

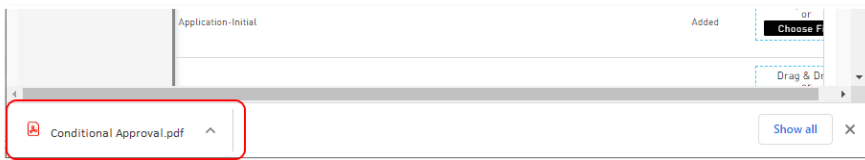***Outcome:*** A file opens in Excel.

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.

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.
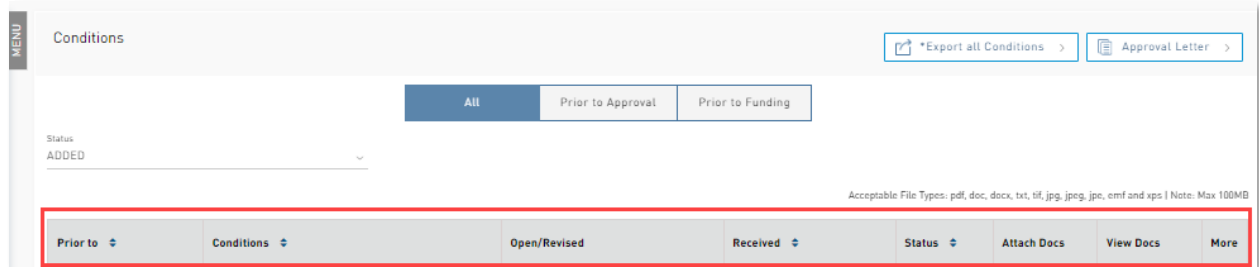
Column Heading	Purpose
Prior to	This describes the category of the condition.
Conditions	This is the name of the condition; the numerical portion is for internal use only.
Open/Revised	This is the date the condition was opened and/or revised by the Underwriter.
Received	This is the date the documents 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.
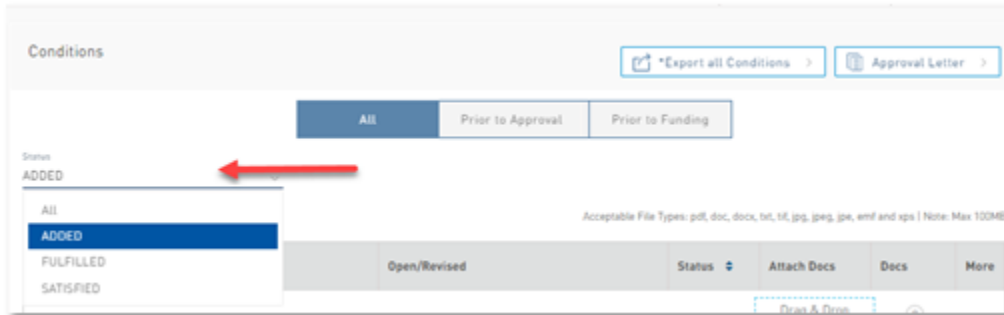
2. Click the ˅ icon to display the descriptions from Encompass.
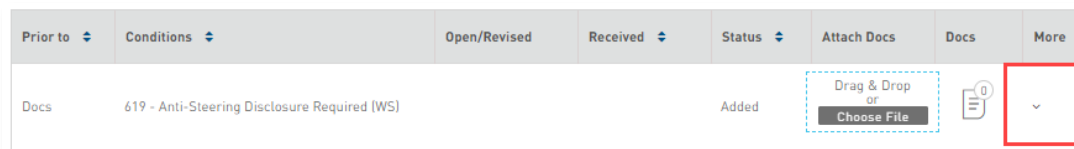
Note: If the Underwriter enters a comment supporting the condition, the comment displays under
   Revision Comments when viewing the condition details.

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
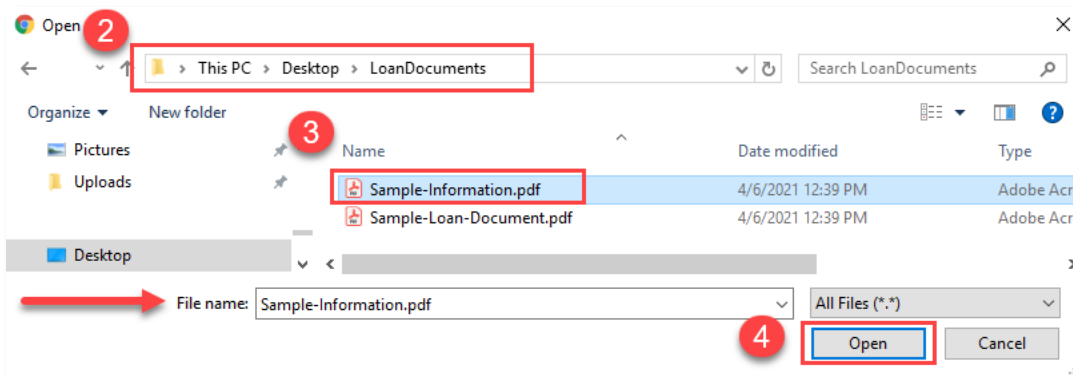
1. Click **Choose File.**
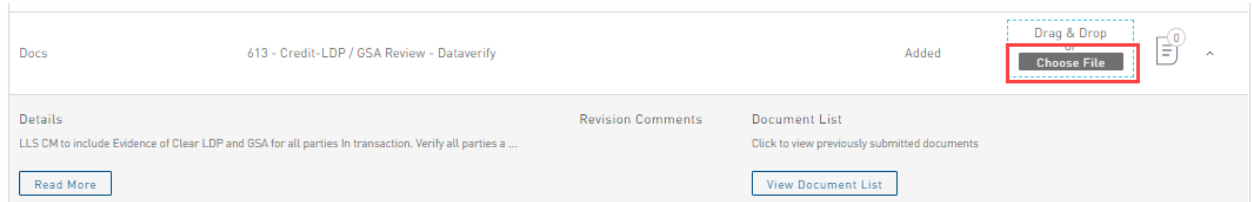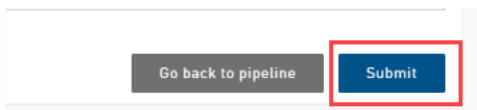

2. Navigate to the location of the document.

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** on the bottom-right of the page to complete the document submission for review.
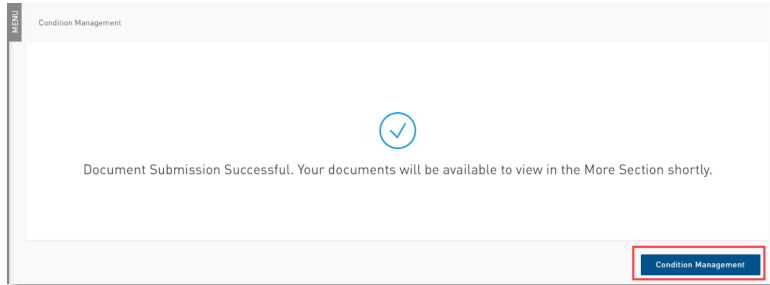
Lakeview Loan Servicing
Proprietary and Confidential
Orig: May 6, 2022_JC

Cor Non-Delegated Lender
Non-Del Portal - Managing Conditions
Page 9 of 11

4. Uploading Documents to Clear Conditions, continued
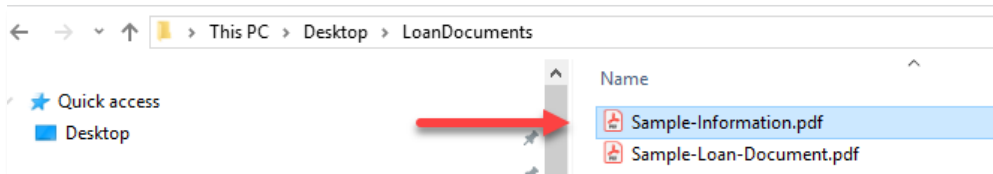
Choose File, continued

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

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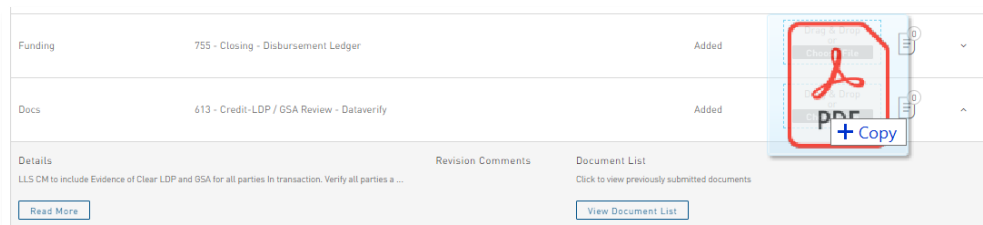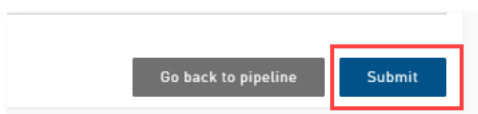

Drag & Drop

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.

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.

Lakeview Loan Servicing
Proprietary and Confidential
Orig: May 6, 2022_JC

Cor Non-Delegated Lender
Non-Del Portal - Managing Conditions
Page 11 of 11