

# Welcome Aboard

Thank you for the opportunity to partner together with Lakeview Correspondent for Non Delegated loan delivery and to provide you with superior service. To process your loan efficiently, below is important information, links and tips to consider for successful loan delivery.



## Training Requirements

NOTE: Please have your Operations and Secondary Teams attend training for our Non-Delegated Portal *prior to your first loan submission.*

- Non-Delegated Underwriting Portal Training
- DSCR (Debt Service Coverage Ratio) Product Overview
- Bank Statement Product Overview
- Jumbo AUS & Jumbo Plus AUS Product Overview
- Plus more!

[View training calendar](#)

## Non-Delegated Product Guidelines

NOTE: Access all our Non-Delegated Product Guidelines through AllRegs.

### Including:

- DSCR
- Bank Statement
- Jumbo AUS & Jumbo Plus AUS
- Special Product Seller Guide
- Non-Agency Documentation Reference Guide



[All Regs](#)

## Non-Delegated Job Aids

- Guide for Admin Tasks
- Guide to Import a Loan File
- Guide to Managing Pipeline View
- Guide to Price Lock Loan
- Guide to Submit Credit Package

[View all resources](#)

## Important Contact Information

- Program Guidelines & Scenario Requests: [NonAgency@bayview.com](mailto:NonAgency@bayview.com)
- Non-Delegated Portal System Support: [ClientServices@bayview.com](mailto:ClientServices@bayview.com)
- Product Registration & Pricing Support: [NonDelClientManagerSupport@bayview.com](mailto:NonDelClientManagerSupport@bayview.com)
- Pricing Exceptions, Relocks & Extensions: [NonDelCommitmentDesk@bayview.com](mailto:NonDelCommitmentDesk@bayview.com)

## Tips

**Pricing** – We allow either “LOCK” or “FLOAT”.

- Loan product selection must be made at time of loan submission.

**Delivery** – Visit the Lakeview Correspondent [website](#).

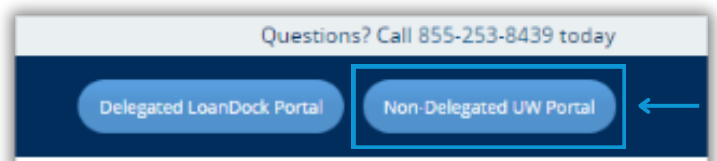
- Select [Non-Delegated Underwriting Portal](#) to upload the complete *credit package* for review (initial submission, underwriting, uploading conditions through clear to close).
- Select Delegated/Closed Loan Portal to upload the *closed loan file* (pre-purchase review, conditions through purchase).

### Initial Loan Submission

- Complete and upload [Product Specific Loan Checklist](#)
- Upload all applicable *required documents* on product specific checklist
- Include any notes or comments that will assist the underwriting with rendering a decision

### Exception Requests

- Complete the [Exception Request Form](#) located on the [Non Delegated Forms](#) section of our website for loans that do not meet guideline eligibility requirements.
- Upload the completed form along with initial file submission.



Please [contact us](#) with any questions prior to submitting your first loan. We are here to help!

