

Bayview Non-Agency Portal

Correspondent Lender Reference Guide

Navigation and Pipeline Management



Silver Hill Capital



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Navigation and Pipeline Management

Log-in into the Loan Portal

- 1. Navigate to LakeviewCorrespondent.com
- 2. Click on the [Delegated LoanDock/Closed Loan Portal](#)



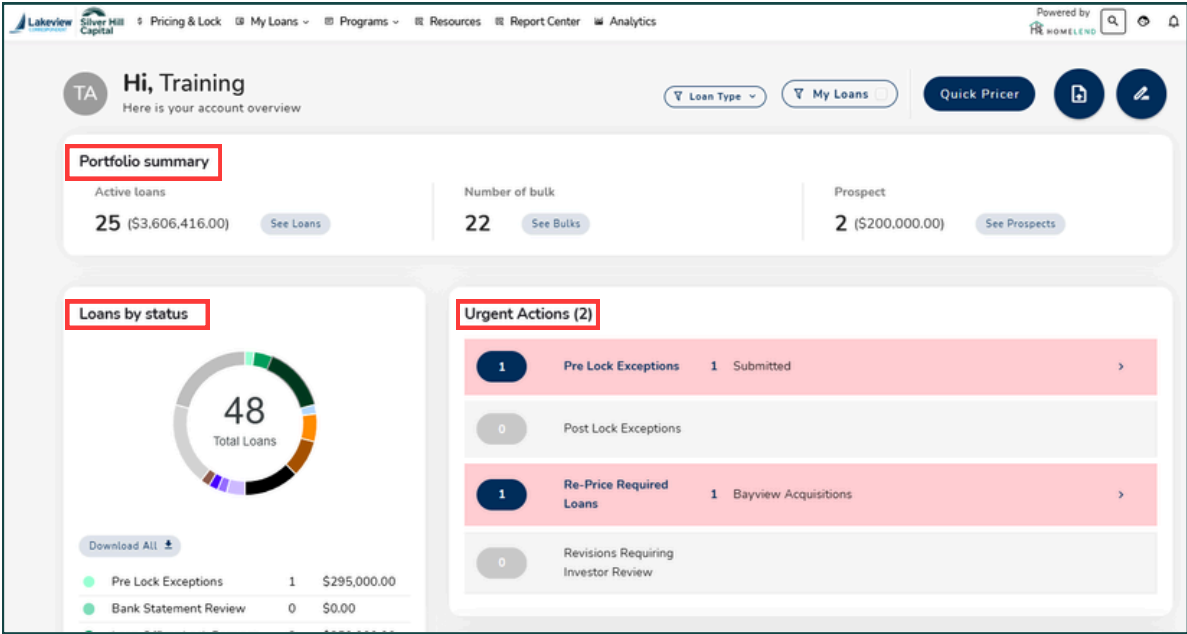
- 3. Enter credentials and click [Logon](#)

- 4. Select [Silver Hill Capital](#)

Reviewing the Dashboard

Note: The dashboard contains several areas of high-level items for a snapshot of the loan pipeline

- **Portfolio summary** – Displays number of active loans, number of bulk loans and number of Prospect loans including associated dollar amounts
- **Loan by Status** – Provides a breakdown of the loans based on their status in the loan flow process
- **Urgent Actions** – Highlights the steps that require the most urgent attention



- Click the urgent action to review the loans

The screenshot shows a table titled 'Pre Lock Exceptions'. The table has the following columns: Actions, UW, Lender ID, BV ID, Type, Program Name, Borrower, Amount, Current Draw (HELOC), Creation Date, Product & Term, and Address. The table contains one row of data:

Actions	UW	Lender ID	BV ID	Type	Program Name	Borrower	Amount	Current Draw (HELOC)	Creation Date	Product & Term	Address
...	0	200025070863	BAYVIEW-UAT-BV10030958	Close...	-	*****	\$295,000.00	\$0.00	11-06-2025	Fixed 30	8875 GOOSAN

- **Action Items** – displays the remaining steps for review that are not in an urgent status

2

Loan Officer Request

2

Bayview Acquisitions

>

2

Loans expiring

0 today

0 2-5 d

1 5-10 d

1 10-15 d

0 15-20 d

>

5

Roll date expiring

0 today

0 2-5 d

5 5-10 d

0 10-15 d

0 15-20 d

>

0

Conditions Investor

0 today

0 2-5 d

0 5-10 d

0 10-15 d

0 15-20 d

0

Conditions Lender

0 today

0 2-5 d

0 5-10 d

0 10-15 d

0 15-20 d

7

Delivery required

7

Bayview Acquisitions

>

0

Loans in suspense

1

Funding review pending

1

Bayview Acquisitions

>

• Navigation Bar

- **Pricing & Lock** – Access Prospect Loans, ability to Rate Lock loan, view Indicative Rate sheets
- **My Loans** – Access the entire pipeline
- **Programs** – Displays programs
- **Resources** – The Resources area shows the platform guides, knowledge base, and provides a link to AllRegs
- **Report Center** – The Report Center houses all the reporting for the portal
- **Analytics** – Provides high-level data around loan statuses

		\$ Pricing & Lock	My Loans ▾	Programs ▾	Resources	Report Center	Analytics
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- **Quick Links**

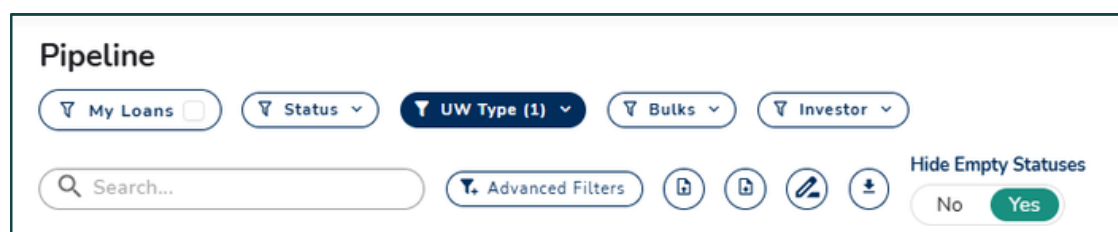
- **Loan Type** – Filter the loan types appearing in the dashboard
- **My Loans** – Access the entire pipeline
- **Quick Pricer** – Estimate loan pricing
- **Upload Loan File** – Begin the Lock & Price process
- **Create Loan Manually** – Begin the manual process for Lock & Price



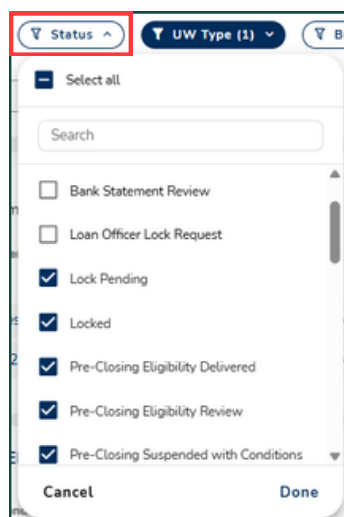
Pipeline Management

Note: Access the Pipeline through the **Navigation Bar** or the **Quick Links**

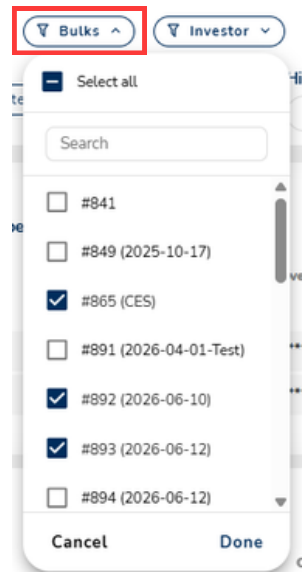
- The Pipeline page displays loans grouped by status based on loan flow
 - Prospect Loans
 - Pre-Lock Exception
 - Lock Pending
 - Locked Loans
 - Delivered Loans
 - Data Validation
 - Pending Investor Review
 - Active Review
 - Suspended
 - Approved For Funding Review
 - Funding Review
 - Purchased Loans
 - Expired / Cancelled Loans
- **Pipeline Navigation Bar**



- **My Loans** – Select to narrow down the view to assigned loans
- **Status** – Filter the Pipeline based on Loan Status



- **UW Type** – Confirm delegated or non-delegated underwriting
- **Bulks** – Filter Pipeline based on Bulk submissions



- **Investor** – Confirm view of Investor Pipeline
- **Search Bar** – Search specific loan numbers



- **Advanced Filters** – Further filter the Pipeline based on defined conditions
- **Quick Links** – Upload Loan File, Download loan templates, Create Loan Manually, Export all loans

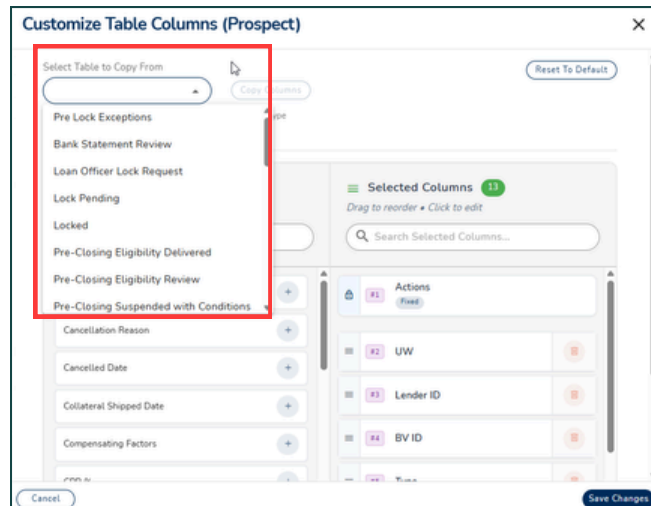


- **Customize Columns**

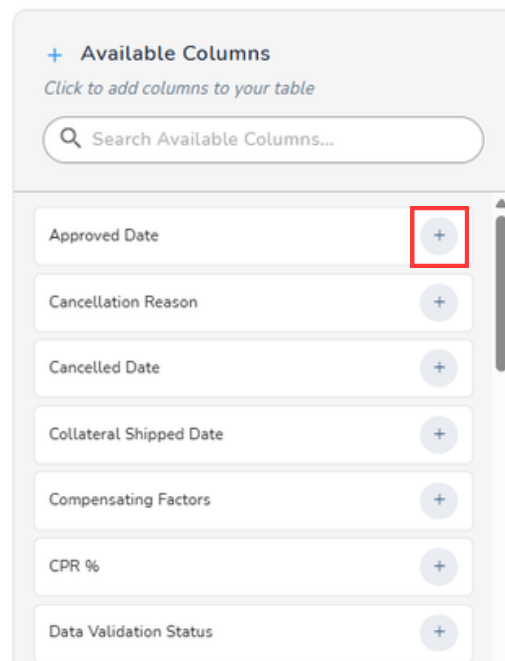
- Click on Customize Columns



- Select Preset Tables from the **Select Table to Copy From or**



- Click available columns from the left side menu or



- Search Available Columns

+ Available Columns
Click to add columns to your table

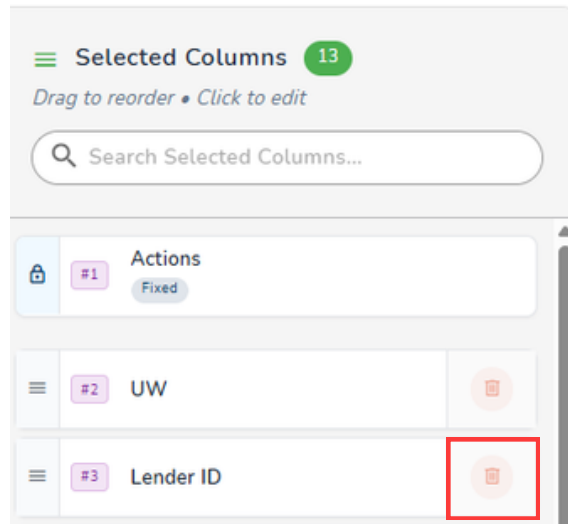
Approved Date	+
Cancelled Date	+
Collateral Shipped Date	+
Delivered Date	+
Expired Date	+

- Drag Columns to reorder

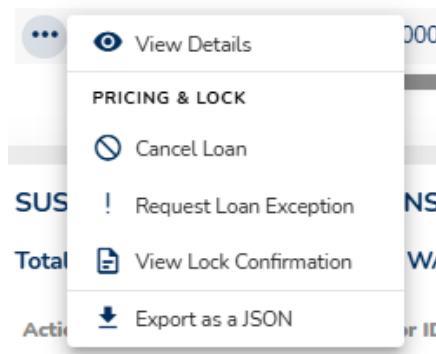
≡ Selected Columns 13
Drag to reorder • Click to edit

#1	Actions	Fixed
#2	UW	
#3	Lender ID	
#4	BV ID	
#6	Program Name	
#5	Type	

- Click the trash can icon to delete a column from view



- **Actions Column** – Perform various loan related tasks from the Actions menu



- Select a Loan to view **Loan Control Panel**

...	D	TestOpus1	10000026	BAYVIEW-UAT-BV10031419	Heloc	Ineligible	-	*****	\$107,677.00	\$107,000.00	Bayview Acquisitions
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Outcome: Loan Control Panel page opens

Loan Control Panel

- **Navigation Menu** – Access various tasks to work based on loan status
- **Actions Menu** – Cancel the loan, Request an extension or exception, View lock confirmation, export loan file

The screenshot displays the 'Loan Control Panel' for a specific loan. The interface includes a navigation menu on the left, an actions menu on the right, and a central area for loan details. The 'GENERAL' section provides key information about the loan's status, investor, program, and underwriting.

- Sections of the **Loan Control Panel** – Contains all relevant information from the loan creation
 - General – Basic Loan information
 - Lock Data
 - Identifying Information
 - Product & Term
 - Senior Lien Details
 - Loan Scenario
 - Application Info
 - Borrower Info
 - Property
 - Mortgage History
 - Geolocation Details
 - Market Data
 - Servicing Info

My LoansProgramsResourcesReport CenterAnalytics

Powered by

Loan Control Panel - BAYVIEW-UM-BV10031414 / Current Loan

Submit

Search fields...

Account Executive

Capital Markets

Collateral

Lock Desk

Post Close

Select user

Select user

Select user

Select user

Select user

Secondary

Shipping

Underwriter

Select user

Select user

Select user

GENERAL

Status

Investor Name

Program

Underwriting Type

Pre-Closing Eligibility Review

Seller Guidelines Used

Loan Officer

Loan Processor

Approved For Funding

Bayview Acquisitions

BV 30 Year HELOC 04-02-26 (#28)

Designated

Not Required

No

None

None

LOCK DATA

Note Rate

Price

Lock Period

Lock Date

Close Date

Custodian

Service

Expiration Date

Delivery Date

Pre Close TPR

Post Close TPR

Floating Rate

Exit Lock Required

8.875%

205.0625

30

03-31-2026

03-31-2026

-

-

04-30-2026

03-31-2026

Manual Review

Manual Review

No

No

Balance Letter Used

No

IDENTIFYING INFORMATION

BV Loan ID

Lender Loan ID

Investor Loan ID

Creation Method

BAYVIEW-UM-BV10031414

testimage12345

10000021

File Import

PRODUCT & TERM

Amortization Type

Loan Term

ID Term

Draw Period

Repayment Period

Buydown Options

HELOC

30 Years

3 Years

36 Months

27 Years

No

SENIOR LIEN DETAILS

Borrower First Name

Borrower Last Name

Senior Lien Loan Amount

Property Address

Property City

Property State

Zip Code

When is the next Senior Lien Payment Change (ARM reset, etc)

\$100,000.00

4842 N/term Rd 139

Springfield

Missouri (MO)

65803

No Change within 2nd Loan Lifetime

Is the Senior Lien a GSE loan?

Senior Lien AUS Decision

Yes

DU Approve / Eligible

LOAN SCENARIO

Loan Type

Loan Purpose

Line Amount

Property Value

Current Draw Amount

Current Draw Remaining

Loan Draw Percentage

LTV

CLTV

Qualifying FICO

DTI

Interest

Cash-Out Refinance

\$125,000.00

\$697,000.00

\$100,000.00

\$25,000.00

0.8 %

17.9340 %

42.2456 %

800

13.0000 %

Occupancy

Residual Income

Reserves

Pre Payment Penalty

Pre Payment Penalty Type

QM Status

Servicing & MSR

Rate Requested

Lock Period Requested

Delayed Financing

Primary Residence

\$0.00

0 months

No Pre Payment Penalty

Flat

Exempt

Servicing Released

8.875 %

30 days

No

Mortgage Insurance

Has Non-Occupant CoBorrowers

Settlement Type

Lien Position

No

No

Best Efforts

Second

APPLICATION INFO

Application Date

Escrows

AUS Type

AUS Decision

Documentation Type

Is this a Piggyback 2nd?

Is there a Balloon payment during the term of the New 2nd Lien?

11-20-2024

No Escrows

DU (Desktop Underwriter)

DU Approve / Eligible

Full Doc 2 Year

No

No

Bank Statement Review Requested

No

BORROWER INFO

Citizenship

Additional Financed Properties

First Time Homebuyer

HomeReady/HomePossible

Self Employed

Number of Borrowers

US Citizen

0

No

Not Applicable

Yes

2

BORROWERS INFO

Order

Borrower First Name

Borrower Last Name

Borrower SSN

Borrower Qualifying FICO

Experian Score

TransUnion Score

Equifax Score

Credit Score Model

Credit Score Date

1

749

-

-

-

-

-

PROPERTY

Property Type

Housing Type

Apartment Type

Property Address

Property City

Property State

Zip Code

County

Lend Type

Single Family

Detached

Full Interior

4842 N/term Rd 139

Springfield

Missouri (MO)

65803

Greene

Mixed

MORTGAGE HISTORY

Borrower has no mortgage history

No

Late Pay (months 01-12)

Late Pay (months 13-24)

30 days

60 days

90 days

30 days

60 days

90 days

0

0

0

0

0

0

GEOLOCATION DETAILS

Geo Eligible

State Code

County Code

CBSA Code

MSA Code

Tract Code

Geo Income Indicator

Population Distressed

Low Density Underserved

Poverty Distressed

No

29

077

44180

44180

5200

3

No

No

No

Unemployment Distressed

Estimated Median Family Income

No

\$63,900.00

MARKET DATA

Extensions Granted

0

SERVICING INFO

Boarded

AutoPay

ID Period End Date

Repayment Period End Date

Draw Period End Date

Draw Period Remaining (Months)

No

No

03-31-2029

03-31-2033

03-31-2029

29

