Register Non Delegated Loans

JOB AID

This Job Aid walks you through how to create a new Non Delegated loan in the system.

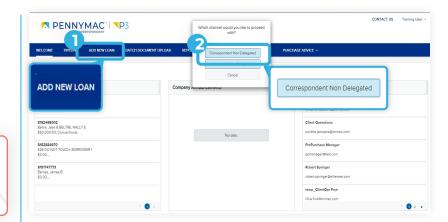


After login into the Portal, follow the next steps:

- 1. Click on the Add a New Loan tab.
- Click the Correspondent Non Delegated button.

ATTENTION!

Step 2 is necessary only if the client is approved for both Delegated & Non-Delegated Loans. Otherwise, it is directed to the Non-Delegated section automatically.



- Once in the Register Non-Delegated Loan screen, you will first see a pop-up to assign the loan to an LO / LP.
 - 1. Organization Name will auto-populate.
 - The User Name (Loan Officer) will include the list of active external users of your company having the personas of Seller Admin or Seller Rep.
 - The User Name (Loan Processor) will include the list of active external users of your company having the personas of Seller Admin, Seller Rep or Seller Processor

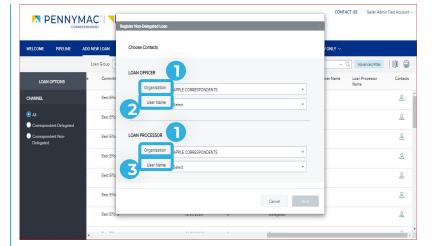
The drop down list will only display your active users in P3. Both LO and LP must be selected to enable the Next button.

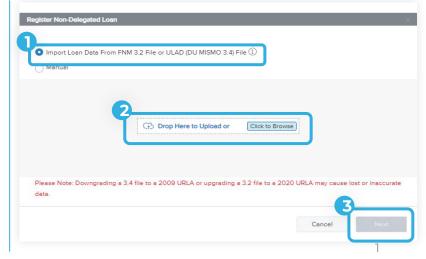


On the next Register Non-Delegated Loan screen, there are 2 options to create the loan:

Option 1

- Click the Import Loan Data from FNM 3.2 File or ULAD File option.
- Click the Click to Browse button to upload a Fannie Mae 3.2 (FNM) or ULAD file from the computer or drag it to the Drop Here to Upload section.
- 3. After uploading is completed, click the Next button to continue.







The system exports the file information and completes the required fields. Some information won't be pulled from the file and may be requested to be added manually.

Information can be added or edited as needed here.

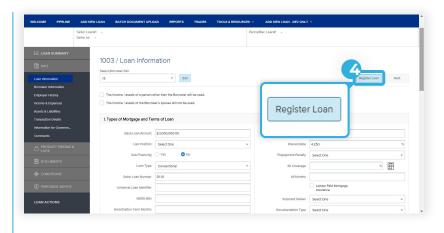
4. After reviewing the information, click the Register Loan button.

Option 2

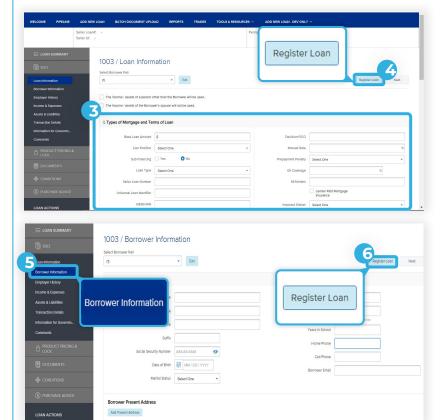
- 1. Click the Manual button.
- 2. Click the Next button to continue.

- Complete the loan information manually.
- After completing the information, click the Register Loan button.

- Additional information that has not been added in the creation process can be added by clicking 1003 in the left menu, for example, to add Borrower Information.
- 6. When the information is completed, click the Register Loan button.



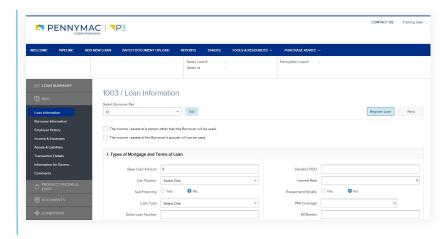






With these steps, the registration process of a loan is completed!

If required fields are not filled, an error message will pop-up asking to complete those fields.



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