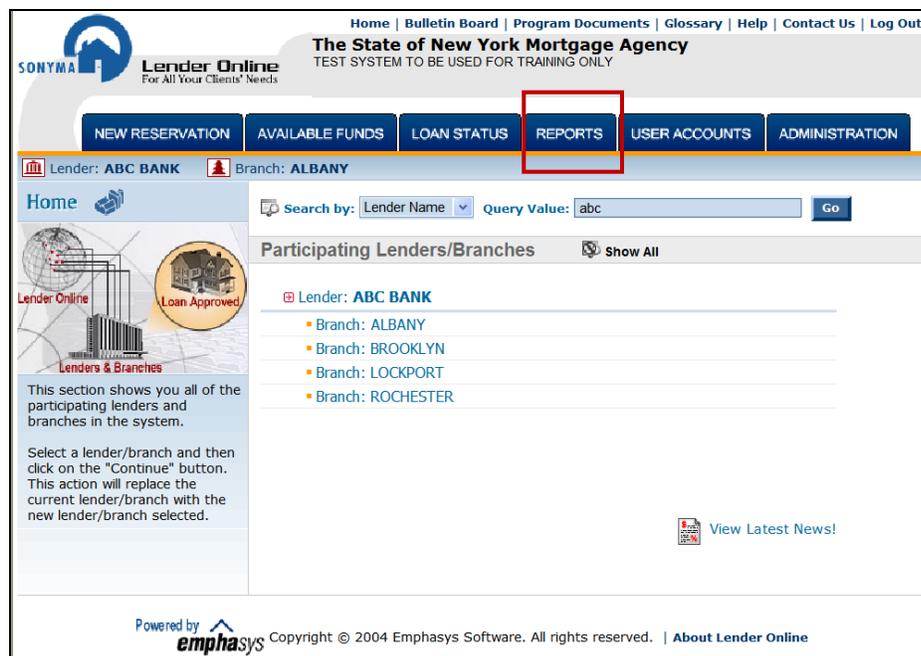


## LENDER ONLINE REPORT PREPARATION GENERAL INFORMATION

### Accessing the LOL Report Screen

To prepare pipeline and document management reports on Lender Online (LOL), complete the following procedures:

- Log on Lender Online (LOL) at: <https://www.SONYMAonline.org>
- Click on the “Reports” tab. Refer to **Figure 1**.



**Figure 1**

- THE REMAINDER OF THIS PAGE IS INTENTIONALLY LEFT BLANK -

- Select desired report from the list displayed on the screen, as shown in **Figure 2** below.

For general report details, refer to **Exhibit 1** below.



**Figure 2**

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- To set up the report for printing, change the page format to “landscape”.
- To download the report to MS Excel, right click the mouse while the report is open and select the option “Export to MS Excel”.

**Note:** This option works only when using the Windows Explorer browser.

- Click on a specific borrower’s Reservation No. within the report to view the Loan Status screen for the borrower selected. The “Conditions/Exceptions” section of the screen lists any outstanding documents. Refer to **Figure 3** below.

Lender Online For All Your Clients' Needs		LOAN STATUS DETAILS	
<b>GENERAL INFORMATION</b>			
Lender Loan No: <b>51082</b>	Lender ID No: <b>ABC</b>	Lender Name: <b>ABC BANK</b>	Branch Name: <b>ROCHESTER</b>
Reservation/Loan No: <b>186ABC88207</b>	Application Date: <b>12/14/2005</b>	Reservation Expires: <b>02/27/2006</b>	Loan Officer:
Commitment Expires: <b>03/23/2006</b>	Extension Date:	Submitted by:	PMI Insurer: <b>UNINSURED</b>
Lock-in Type: <b>S</b>	Borrower Name: <b>INTERLICCI</b>	PMI Certificate No:	Pool Servicer: <b>Genworth MI Co.</b>
Social Security No: <b>****-**-8546</b>	Co-Borrower Name:	Pool Certificate No: <b>7450246830</b>	Origination Reviewer: <b>MJ</b>
Household Size: <b>1</b>	Household Income: <b>\$69,048.00</b>	Closing Reviewer: <b>JS</b>	Final Reviewer:
<b>FIRST MORTGAGE</b>		<b>SECOND MORTGAGE</b>	
Program: <b>Achieving the Dream Program</b>		Program:	
Loan Amount: <b>\$79,540</b>		Loan No:	
Term: <b>360 months</b>		Loan Type:	
Initial Interest Rate: <b>5.1250%</b>		Loan Amount: <b>\$0</b>	
CCAL Amount: <b>\$0.00</b>		Term: <b>0 months</b>	
DPAL Amount: <b>\$0.00</b>		Initial Interest Rate: <b>0.0000%</b>	
<b>PROPERTY INFORMATION</b>		<b>STAGE/STATUS/DATE</b>	
Street Number: <b>1189</b>		• Final Documents / <b>Outstanding</b> on <b>09/15/2008</b>	
Street Name: <b>IN URCH ROAD</b>		• Purchased on <b>10/02/2008</b>	
Unit Number:		• Closed Docs Rev / <b>Approved</b> on <b>09/15/2008</b>	
City: <b>West Seneca</b>		• Closed Docs Rec on <b>09/15/2008</b>	
State: <b>NY</b>		• Closed on <b>09/03/2008</b>	
Zip Code: <b>142240000</b>		• SONYMA Commitmt / <b>Approved</b> on <b>08/20/2008</b>	
County: <b>Erie</b>		• SONYMA Reviewed / <b>Approved</b> on <b>07/17/2008</b>	
Project Name: <b>Existing</b>		• SONYMA Received on <b>07/16/2008</b>	
Purchase Price: <b>\$82,000.00</b>		• Pool Ins Review / <b>Approved</b> on <b>08/11/2008</b>	
Appraised Value: <b>\$0.00</b>		• Lender Review / <b>Approved</b> on <b>08/20/2008</b>	
Target Area: <b>No</b>		• Reserved on <b>08/20/2008</b>	
<b>CONDITIONS/EXCEPTIONS</b>		<b>REJECTION REASONS</b>	
1. *Original Recorded Assignment of Mortgage (Form 202/9-99)			
2. --Original document and photocopy required.			
3. *Original Mortgage Title Insurance (ALTA) Policy			
4. --Original document and photocopy required.			
5. *Original Recorded Mortgage (Fannie Mae/Freddie Mac Form 3033)			
6. --Original document and photocopy required.			
Final Docs Penalty Fee: <b>\$0.00</b>			

**Figure 3**

## General Report Procedures

Once an LOL User is on a specific report data entry screen, LOL User may use the drop-down menu at the top of the screen to select a different report.

**General Report Procedures** – Please note the following report features:

Viewing Reports – All reports can be viewed by an LOL User on their computer screen and can be printed if desired.

Printing Reports – To set up the report for printing, change the page format to “landscape”. If desired, LOL User can right click the mouse while the report is open to export the report to MS Excel.

**Note:** This option works only when using the Windows Explorer browser.

Selection Options – All reports give the LOL User the option of running reports for all lender branches, SONYMA programs, loan officers, etc. If the LOL User wants to narrow the report parameters by running a report for a specific branch(es), SONYMA program(s), loan officer(s), etc., they can do so by clicking on the “Select” option (as a report option allows). **Please note that some of the below functions may not be applicable for all reports.**

To select more than one item from a list, hold the “Ctrl” key while making each selection, and then click on “Insert”.

- a. Select the specific Branch(es) from the drop down list (by clicking on “Select”) or select “All”
- b. Select the Loan Officer(s) from the drop down list (by clicking on “Select”) or select “All”
- c. Select the SONYMA Program(s) from the drop down list (by clicking on “Select”) or select “All”
- d. Select the Last Stage(s) from the drop down list (by clicking on “Select”) or select “All”

Note that a “stage” is where the loan resides in the loan process. For example, a loan with the stage of “SONYMA Received” means that the closed loan documents have been received by SONYMA and the file is being reviewed.

- e. Select the Last Stage(s)/Status(es) from the drop down list (by clicking on “Select”) or select “All”
- f. Select the Project from the drop down list (by clicking on “Select”) or select “All”
- g. Enter the appropriate “From” and “To” dates
- h. Click on the desired Type of Report format: “Detailed” or “Summarized”
- i. Select the Sort Criteria
  - i. Group 1 (Branches, Officers, or Programs)
  - ii. Group 2 (Branches, Officers, or Programs)
  - iii. Group 3 (Branches, Officers, or Programs)

Note that the user may sort in ascending or descending order and/or may select page breaks.

- j. Press the “Run Report” button
- k. User may click on the “Reservation Number” for any specific loan listed on the report in order to link to the Loan Status screen for the selected loan.
- l. Once a report has been generated, close the report by clicking on the “X” in the top right-hand corner of the report. If the user clicks on “Back”, the report will be re-generated.

**Note:** Not all options are available to all LOL Users. If the LOL User does not have access to a specific function, the unauthorized function will not appear.