

LENDER ONLINE REPORT PREPARATION CURRENT STAGE STATUS REPORT (Summary Report)

Report Purpose - This report provides summarized information for all loans in the Lender’s SONYMA pipeline. The report can include all Mortgage Loans in the Lender’s pipeline (from Reservation to the date SONYMA has received all final closing documents) or a subset thereof. This report features much flexibility and may be produced and customized to fit the LOL User’s needs.

For details regarding the preparation of this report, refer to Reports section of the LOL User Guide.

Note: Loans will drop off of the LOL system once the loan has been cancelled or rejected for 120 days or once the final closed loan documents have been delivered to and approved by SONYMA.

- Log onto the LOL System
- Click on the “Reports” tab
- Click on the “Current Stage Status” Report (refer to Figure 1)



Figure 1

- Click the “Select” button in the “Last Stages” section of the screen. Refer to **Figure 2.**

05/12

Figure 2

- Highlight the desired Loan Stage from the drop-down menu. Refer to **Figure 3**.

Note: If more than one stage is selected, hold down the “Ctrl” key while making all selections.

Note: Make the following selections for specialized reports:

- * Identify Suspended Pre-Closing (Compliance) Loan Files
 - Select Loan Stage: “SONYMA Reviewed”
 - Select Last Stage / Status: “Pending”
- * Identify Approved Pre-Closing (Compliance) Loan Files
 - Select Loan Stage: “SONYMA Commitment”
 - Select Last Stage / Status: “Approved”
- * Identify Suspended Post-Closing Loan Files
 - Select Loan Stage: “Closed Docs Rev(iewed)”
 - Select Last Stage / Status: “File Incomplete”
- * Identify Approved Post-Closing Loan Files
 - Select Loan Stage: “Closed Docs Rev(iewed)”
 - Select Last Stage / Status: “Approved”

- Click on “Insert”.

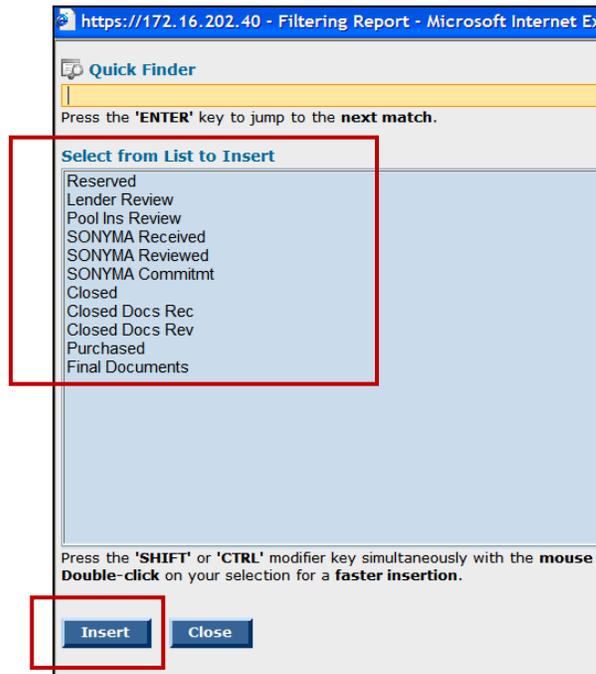


Figure 3

- Click the “Select” button in the “Last Stage/Status” section of the screen. Refer to Figure 4.

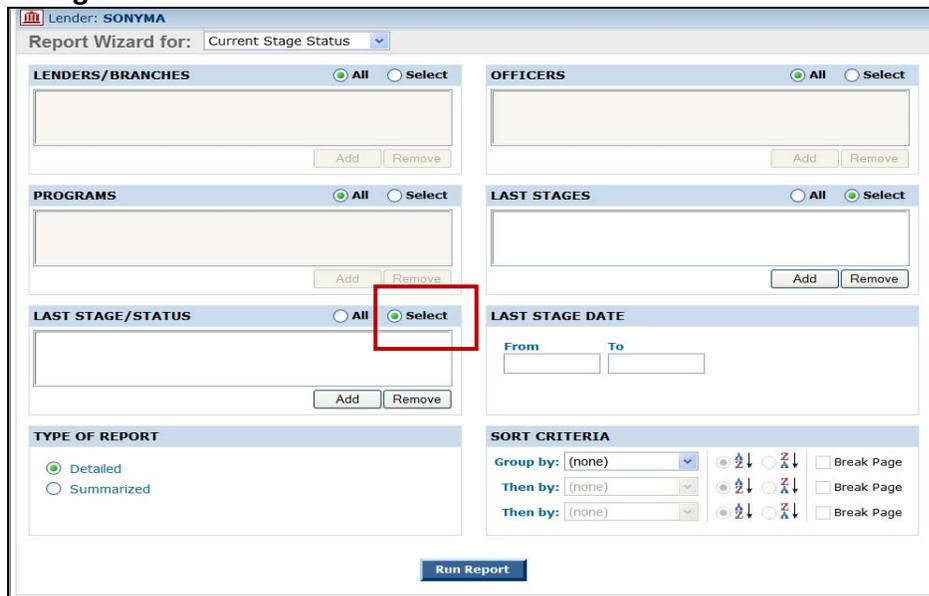


Figure 4

- Highlight the desired Last Stage/Status from the drop-down menu. Refer to Figure 5.

Note: If more than one status is selected, hold down the “Ctrl” key while making all selections.

Refer to the above notes regarding the creation of specialized reports.

- Click on “Insert”.

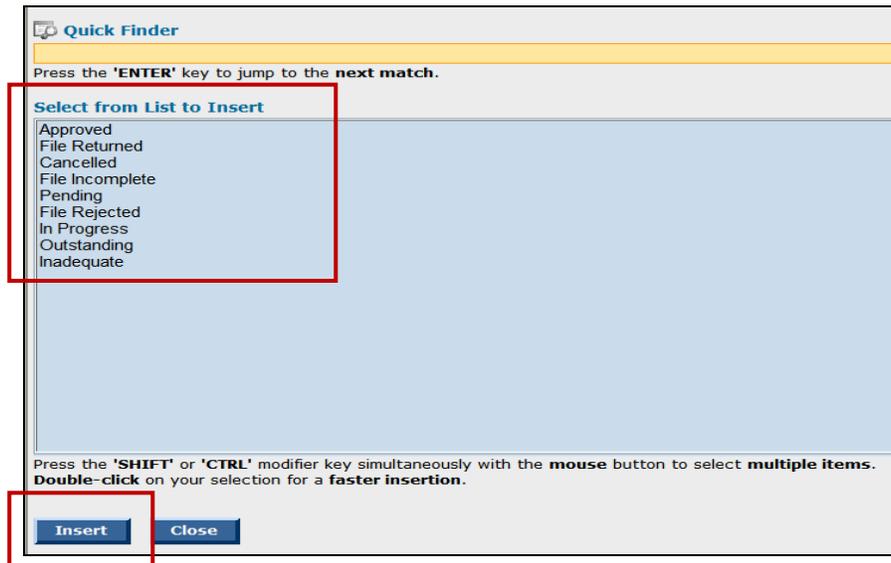


Figure 5

- Select “Summarized” in the “Type of Report” section of the screen
- Select the desired report sorting criteria (in this example, the report will be sorted by “Programs” and “Stages”)
- Click on “Run Report”. Refer to **Figures 6 and 7**.

Lender: **SONYMA**

Report Wizard for: **Current Stage Status**

LENDERS/BRANCHES All Select

OFFICERS All Select

PROGRAMS All Select

LAST STAGES All Select

LAST STAGE/STATUS All Select

LAST STAGE DATE

From: To:

TYPE OF REPORT

Detailed

Summarized

SORT CRITERIA

Group by: Programs A-Z Z-A Break Page

Then by: Stages A-Z Z-A Break Page

Then by: (none) A-Z Z-A Break Page

Run Report

Figure 6

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Lender Online
For All Your Clients' Needs

The State of New York Mortgage Agency
TEST SYSTEM TO BE USED FOR TRAINING ONLY
CURRENT STAGE STATUS SUMMARIZED REPORT

Updated on Wednesday, May 16, 2007, at 02:21 PM

Summarized Field	Loans	Amount
Branch:		
Program: Low Interest Rate - Short Term Lock-in		
Status: Pending	1	\$116,400
TOTAL	1	\$116,400
TOTAL		
1		\$116,400
Branch: ALBANY		
Program: Achieving the Dream Mortgage Program		
Status: Pending	2	\$122,700
TOTAL	2	\$122,700
Program: Achieving the Dream Program with CCAL		
Status: File Rejected	1	\$108,800
TOTAL	1	\$108,800
Program: Low Interest Rate - Short Term Lock-in		
Status: Approved	1	\$69,000
Status: Pending	1	\$60,000
TOTAL	2	\$129,000
Program: Low Interest Rate - Short Term with CCAL		
Status: Cancelled	2	\$167,300
Status: File Rejected	1	\$50,000
Status: Pending	5	\$351,000
TOTAL	8	\$668,300
TOTAL	13	\$928,800
Branch: BROOKLYN		
Program: Low Interest Rate - Short Term with CCAL		
Status: Cancelled	1	\$290,700
Status: File Rejected	1	\$309,000
TOTAL	2	\$699,700
Program: Low Interest Rate Program		
Status: Outstanding	1	\$125,000
TOTAL	1	\$125,000
TOTAL	3	\$724,700
Branch: LOCKPORT		
Program: Achieving the Dream Mortgage Program		
Status: Approved	1	\$104,500
Status: File Returned	1	\$89,000
Status: Outstanding	1	\$70,000
Status: Pending	2	\$262,450
TOTAL	5	\$614,950
Program: Achieving the Dream Program with CCAL		
Status: Approved	1	\$36,957
Status: File Rejected	1	\$117,800
Status: Pending	1	\$46,590
TOTAL	3	\$200,347
Program: Construction Incentive Program		
Status: Pending	1	\$100,000
TOTAL	1	\$100,000
Program: Low Interest Rate - Long Term Lock-in		
Status: Pending	1	\$67,000
TOTAL	1	\$67,000
Program: Low Interest Rate - Short Term Lock-in		
Status: Approved	1	\$63,360
Status: Cancelled	2	\$122,700
Status: File Rejected	1	\$95,000
Status: Outstanding	1	\$102,900
Status: Pending	2	\$147,750
TOTAL	7	\$621,700
Program: Low Interest Rate - Short Term with CCAL		
Status: Pending	1	\$126,300
TOTAL	1	\$126,300
Program: Low Interest Rate Program		
Status: Outstanding	1	\$75,000
TOTAL	1	\$75,000
TOTAL	19	\$1,605,297
Branch: ROCHESTER		
Program: Achieving the Dream Mortgage Program		
Status: Approved	3	\$206,300
Status: Cancelled	1	\$90,000
Status: File Incomplete	1	\$77,800
Status: Inadequate	1	\$25,000
Status: Outstanding	1	\$66,200
Status: Pending	7	\$793,850
TOTAL	14	\$1,249,150
Program: Achieving the Dream Program with CCAL		
Status: Pending	2	\$112,800
TOTAL	2	\$112,800
Program: Construction Incentive Program		
Status: File Rejected	1	\$150,000
Status: Pending	1	\$216,000
TOTAL	2	\$366,000
Program: Low Interest Rate - Long Term Lock-in		
Status: Pending	4	\$544,195
TOTAL	4	\$544,195
Program: Low Interest Rate - Short Term Lock-in		
Status: Approved	8	\$849,500
Status: File Rejected	1	\$73,700
Status: Pending	7	\$803,250
TOTAL	16	\$1,756,450
Program: Low Interest Rate - Short Term with CCAL		
Status: Pending	4	\$396,950
TOTAL	4	\$396,950
Program: Low Interest Rate Program		
Status: Outstanding	1	\$85,400
TOTAL	1	\$85,400
TOTAL	43	\$4,509,945
GRAND TOTAL	79	\$7,885,142

Figure 7