

Using Point's Freddie Mac Loan Assignment





calyx

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Request Type

Use the *Request* dropdown menu to select the desired action.

Request

Options available:

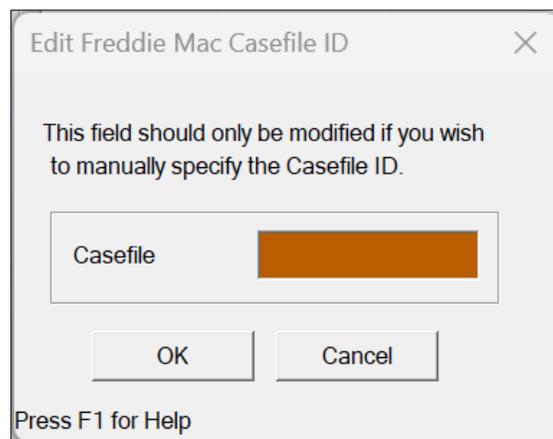
- **Assign Loan:** Assign an LPA-authorized loan to another Broker/Correspondent Lender. LPA-authorized loans must contain the *Good Standing* result before assigning them to a company. See [Assigning a Loan](#).
- **Loans my company has assigned:** View loans your company has assigned to other companies. Assigned loans are viewed in the *Loan History* table. See [Viewing Loans My Company has Assigned](#).
- **Release loan:** Send back a loan assigned to your company to the loan's original owner. See [Releasing Loans](#).

Select Company

The *Select Company* dropdown menu contains the list of permitted companies for loan assignments.

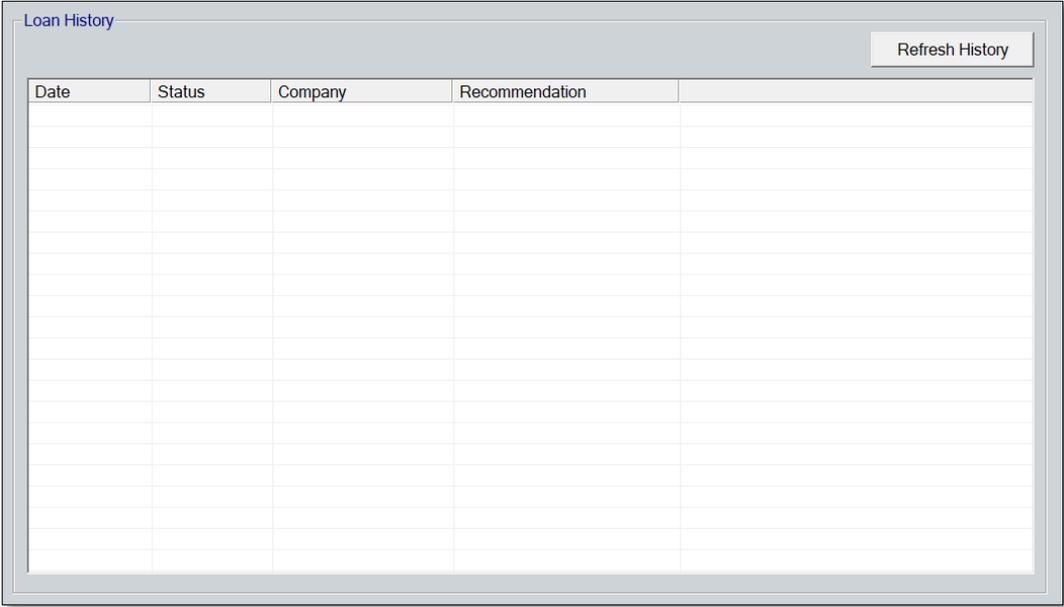
Casefile ID

This field contains an ID number for each assigned loan. Click on the *Edit* button to modify the Casefile ID. The user can remove the Casefile ID by deleting the values in the field.



Loan History

View the history of assignments for a loan. The table below will contain a record of assignments for the loan opened. The *Refresh History* button allows the user to populate the table with the history of loan assignments for the *Casefile ID* entered in the field.

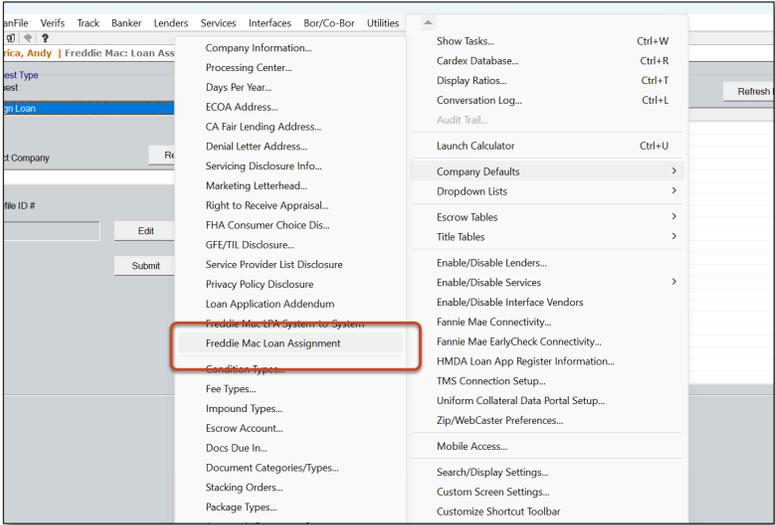


Freddie Mac Loan Assignment Company Setup

The *Freddie Mac Loan Assignment Company Setup* screen is a utility that allows the user to add permitted companies to assign loans.

To locate the utility:

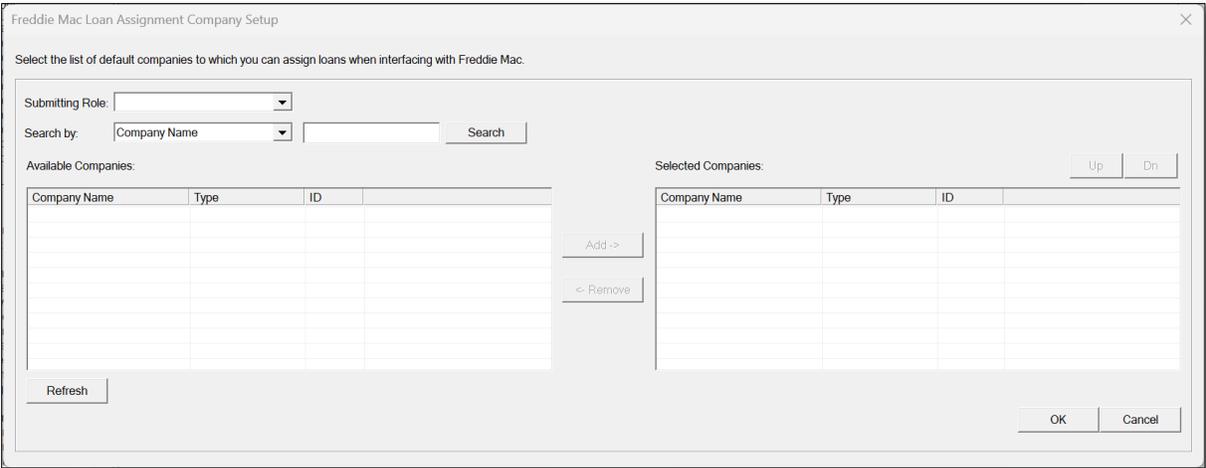
1. Open a new or an existing loan.
2. Select **Utilities > Company Default > Freddie Mac Loan Assignment**.



3. Add the desired company.

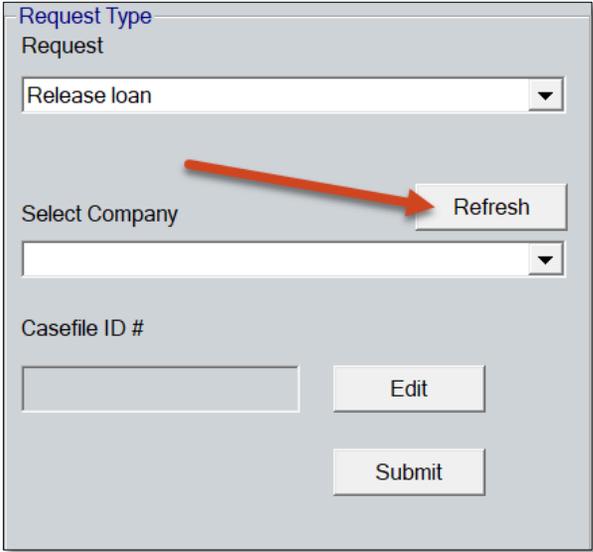
Add a Company for Loan Assignment

Only companies authorized by Freddie Mac are allowed loan assignments. Follow these steps to add a company to the *Freddie Mac Loan Assignment Company Setup* screen.



To add a company:

1. Open the **Freddie Mac Loan Assignment Company Setup** utility.
- Or
2. Click **Refresh** on the *Freddie Mac Loan Assignment* screen.



3. Select the desired **Submitting Role**.
4. Use the **Search by** dropdown to select a condition.
- Or

5. Use the **Search** bar to specify a company.



Freddie Mac Loan Assignment Company Setup

Select the list of default companies to which you can assign loans when interfacing with Freddie Mac.

Submitting Role: Broker

Search by: Company Name Search

Available Companies: Selected Companies:

Up Dn

6. Click the **Search** button.
7. Click on the desired available company from the table.

Note: Use the *Refresh* button to reload the *Available Companies* table.

8. Click the **Add->** button to move the desired company to the *Selected Companies* table.
9. Click **Ok** to exit the screen.

Assigning a Loan

Assigning a Loan is allowed to companies permitted by Freddie Mac.

To assign a Loan:

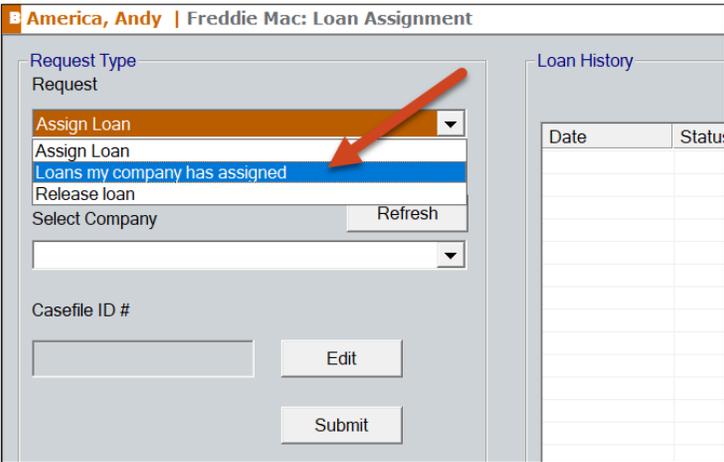
1. In the *Request Type* dropdown, select **Assign Loan**.
2. Select an available company from the **Select Company** dropdown.
3. Select **Submit**. See [Freddie Mac Loan Assignment Company Setup](#).

Viewing Loans My Company has Assigned

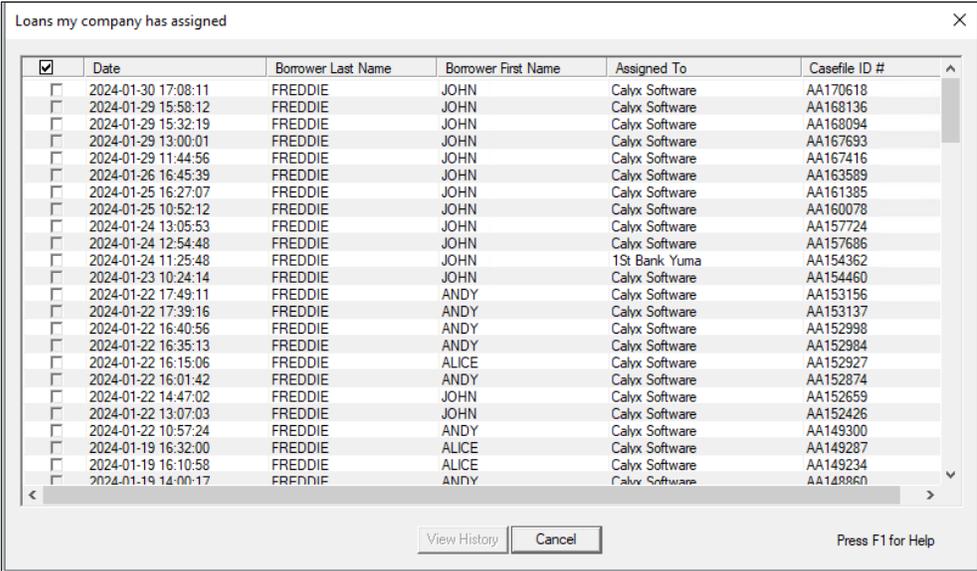
Use this *Request Type* to view loans your company has assigned to other companies. The results will appear in the *Loan History* table.

To view loans:

- 1. Select the **Loans assigned to my company** option from the *Request* dropdown menu.



- 2. Click on the **Submit** button. The *Loans my company has assigned to my company* table opens.
- 3. Check the desired casefile.



4. Click the **View History** button to open the *Loan History* for the chosen casefile.

Date	Status	Company	Recommendation
2024-02-01 11:35:38	ASSIGNED TO	Calyx Software	Accept
2024-02-01 10:30:45	RELEASED BY	Calyx Software	Accept
2024-02-01 10:30:04	ASSIGNED TO	Calyx Software	Accept
2024-01-31 16:46:58	ASSIGNED BY	Calyx Software	Accept
2024-01-31 15:53:01	ASSIGNED BY	Calyx Software	Accept
2024-01-31 15:43:14	ASSIGNED BY	Calyx Software	Accept
2024-01-31 13:13:08	ASSIGNED BY	Calyx Software	Accept
2024-01-31 12:45:08	ASSIGNED BY	Calyx Software	Accept
2024-01-31 11:54:20	ASSIGNED BY	Calyx Software	Accept
2024-01-30 17:08:11	ASSIGNED TO	Calyx Software	Accept
2024-01-30 14:31:08	ASSIGNED BY	Calyx Software	Accept
2024-01-30 11:59:18	RELEASED BY	Calyx Software	Accept
2024-01-30 11:39:02	RELEASED BY	Calyx Software	Accept
2024-01-30 11:38:16	ASSIGNED TO	Calyx Software	Accept
2024-01-30 0:28:39	ASSIGNED TO	Calyx Software	Accept
2024-01-30 0:25:50	ASSIGNED BY	Calyx Software	Accept
2024-01-29 22:17:13	ASSIGNED BY	Calyx Software	Accept
2024-01-29 17:00:21	ASSIGNED BY	Calyx Software	Accept
2024-01-29 17:00:07	RELEASED TO	Calyx Software	Accept
2024-01-29 15:58:12	ASSIGNED TO	Calyx Software	Accept
2024-01-29 15:32:19	ASSIGNED TO	Calyx Software	Accept
2024-01-29 13:51:08	RELEASED TO	Calyx Software	Caution
2024-01-29 13:50:55	ASSIGNED BY	Calyx Software	Caution
2024-01-29 13:50:03	RELEASED TO	Calyx Software	Caution
2024-01-29 13:49:49	ASSIGNED BY	Calyx Software	Caution

Note: The *Loan History* table is read-only.

Releasing Loans

Use this option to return a loan assigned to your company back to the loan's original owner.

America, Andy | Freddie Mac: Loan Assignment

Request Type
Request

Release loan
Assign Loan
Loans my company has assigned
Release loan

Select Company Refresh

Casefile ID # Edit Submit

Loan History
Date