Using Point's Freddie Mac Loan Assignment





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6475 Camden Avenue, Suite 207 San Jose, CA 95120 Corporate Office: (408) 997-5525 Dedicated Customer Service: (800) 342-2599 Sales: (800) 362-2599

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Introduction to the Loan Assignment

The *Freddie Mac Loan Assignment* screen allows the user to assign, view, or release loans from Freddie Mac authorized companies. This guide contains information about the features and functionality of the screen.

Loan Assignment Location

To access the Freddie Mac Loan Assignment screen:

- 1. Open Point.
- 2. Open a new or existing loan file.
- 3. On the Main Menu, select Services > Freddie Mac > Loan Assignment.



Loan Assignment Features

The *Freddie Mac Loan Assignment* is a system-to-system interface designed to assign LPA (*Loan Product Advisor*) completed loan submissions to another Freddie Mac LPA authorized company. Users assigning and receiving loan submissions must have an LPA account associated with Freddie Mac.

America, Andy Freddie Mac: Loan A	ssignment				
Request Type Request	Loan Histor	y			Refresh History
Assign Loan	Date	Status	Company	Recommendation	
Select Company	Refresh				
Casefile ID #					
Submit					

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. LPAauthorized 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.

Edit F	Freddie Mac Casefile ID	\times
This to n	field should only be modified if you wish nanually specify the Casefile ID.	
С	asefile	
	OK Cancel	
Press F	1 for Help	

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.

	Refresh Histor			
Date	Status	Company	Recommendation	

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.

rob but	w Name		Search					
ilable Companies:	iy Name	<u> </u>	Jean		Selected Companies:			Up Di
mpany Name	Туре	ID		_	Company Name	Туре	ID	
				Add ->				
				<- Bemove				

To add a company:

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

Request Type Request	
Release loan	•
Select Company	Refresh
	•
Casefile ID #	
	Edit
	Submit

- 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 MyBroker(LLC Search		
Available Companies:	Selected Companies:	Up Dn
Democrystiane Time ID	Compony Name Time	

- 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.

B America, Andy Freddie Mac: Loan Assignment		
Request Type	Loan History	
Assign Loan	Date	Statu
Assign Loan		
Loans my company has assigned Release loan		
Select Company Refresh		
Casefile ID #		
Edit		
Submit		

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

2	Date	Borrower Last Name	Borrower First Name	Assigned To	Casefile ID #	
Γ	2024-01-30 17:08:11	FREDDIE	JOHN	Calyx Software	AA170618	
Г	2024-01-29 15:58:12	FREDDIE	JOHN	Calyx Software	AA168136	
	2024-01-29 15:32:19	FREDDIE	JOHN	Calyx Software	AA168094	
Г	2024-01-29 13:00:01	FREDDIE	JOHN	Calvx Software	AA167693	
	2024-01-29 11:44:56	FREDDIE	JOHN	Calyx Software	AA167416	
	2024-01-26 16:45:39	FREDDIE	JOHN	Calyx Software	AA163589	
	2024-01-25 16:27:07	FREDDIE	JOHN	Calyx Software	AA161385	
	2024-01-25 10:52:12	FREDDIE	JOHN	Calyx Software	AA160078	
	2024-01-24 13:05:53	FREDDIE	JOHN	Calyx Software	AA157724	
Г	2024-01-24 12:54:48	FREDDIE	JOHN	Calyx Software	AA157686	
Γ	2024-01-24 11:25:48	FREDDIE	JOHN	1St Bank Yuma	AA154362	
	2024-01-23 10:24:14	FREDDIE	JOHN	Calyx Software	AA154460	
	2024-01-22 17:49:11	FREDDIE	ANDY	Calyx Software	AA153156	
Г	2024-01-22 17:39:16	FREDDIE	ANDY	Calyx Software	AA153137	
	2024-01-22 16:40:56	FREDDIE	ANDY	Calyx Software	AA152998	
Г	2024-01-22 16:35:13	FREDDIE	ANDY	Calyx Software	AA152984	
Γ	2024-01-22 16:15:06	FREDDIE	ALICE	Calyx Software	AA152927	
Г	2024-01-22 16:01:42	FREDDIE	ANDY	Calyx Software	AA152874	
Γ	2024-01-22 14:47:02	FREDDIE	JOHN	Calvx Software	AA152659	
	2024-01-22 13:07:03	FREDDIE	JOHN	Calyx Software	AA152426	
	2024-01-22 10:57:24	FREDDIE	ANDY	Calyx Software	AA149300	
	2024-01-19 16:32:00	FREDDIE	ALICE	Calyx Software	AA149287	
	2024-01-19 16:10:58	FREDDIE	ALICE	Calyx Software	AA149234	
Г	2024-01-19 14:00:17	FREDDIE	ANDY	Calvy Software	AA148860	
						>

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

Loan History				×
Date	Status	Company	Recommendation	^
2024-02-01 11:35:38	ASSIGNED TO	Calvx 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	Calvx Software	Caution	×
<				>
			[Close

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.

B America, Andy Freddie Mac: Loan Assignment	
Request Type Request Release loan Assign Loan Loans my complex has assigned Release loan	Loan History
Select Company Refresh	
Casefile ID #	
Edit	
Submit	