

LOS Integration

More

Loan Program and Specialty Program Access Management

Selections on the LO's HR record in Unifyty determine available Loan Programs, Lenders and Specialty Programs in your LOS.

Enumeration Updates

Unifyty can also push employee information such as name, location job title, etc. to your LOS. This resolves data consistency issues for reporting, is always up to date and reduces human capital requirements for maintaining these lists. Any place in your LOS that uses a pulldown list for these fields are automatically maintained.

The screenshot displays a 'Loan Officer Worksheet Pg 2' interface. On the left, a sidebar lists various menu items: 'General', 'Add', 'Active', 'Sign Up Date', 'Catalyst Account', 'Balance Require', 'Notes', 'Split Agreements', and a 'Save' button. The main area is divided into several sections:

- Transaction Details:** Lists loan terms such as '3300 Conf 30yr FRM', '3300 Conf 30yr 3/1 LIBOR ARM (2/28)', '3300 Conf 30yr 5/1 LIBOR ARM (2/28)', etc.
- Loan Terms:** Includes fields for 'Interest Rate' (4.000) and 'Qualifying Rate' (4.000).
- Subordinate Financing:** Shows 'Current Balance' and 'Closed-End 2nd' with associated LTV and HLTV values.
- Apply to Curr Transaction:** A list of checkboxes for loan programs and specialty programs, including:
 - FHA
 - CHFA
 - USDA
 - KSHAP
 - Reverse
 - NV-NRHA
 - OTC
 - NV-NHD
 - MFA
 - Denver MMA
 - Missouri Housing Dev Comm
 - NHF/GSFA Platinum
 - UT Housing

Blue arrows point from the 'Websites', 'Training', 'Trans', 'HR', 'Expenses', 'Exp Split', 'Disclosures', and 'Time O' tabs in the top navigation bar to the corresponding checkboxes in the 'Apply to Curr Transaction' section. The right side of the interface shows 'Transaction Details' with fields for 'Purchase Price', 'Down Pymt %', 'Base Loan Amount', 'Total Loan Amount', and 'Subordinate Financing'.



LOS Integration

The LOS logic filters Loan and Specialty program availability based on licensing, tracked in Unifyty. License information and Expiration are automatically updated from Unifyty to your LOS.

General Address LO Info Notes License Comp Plans Reviews Equipment Logins Ins App Websites Training Trans HR Expenses Disclosures Time Off Request

Licensing Entity	Type	License No.	State	Notes	Start Date	Expiration	Active	Verified		
	DRE		CA	CA-DRE License Endorsement Renewed 2014		10/15/2018	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete
	NMLS		-Nat-			12/31/2099	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete
	Continuing Education		CA		10/26/2011	12/31/2014	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete
	Loan Officer		AZ		4/18/2013	12/31/2014	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete

Licensing Entity: Type: -- Select -- State: -- Select -- National Active Verify

Name: License No.: Start Date: Expiration:

Notes:

Add

User Details

Account Information Disable Login Disable Account

- User ID
- Password
- Re-type Password
- Force user to change password
- First Name
- Middle Name
- Last Name
- Suffix
- Employee ID Number
- Phone Number
- Cell Phone Number
- Fax Number
- Email
- CHUM
- Working Folder: Catalyst Prequal
- NMLS Loan Originator ID
- NMLS Expiration Date: 12/31/2014

Loan Officer Active Licenses (2)

State	License Number	Expiration Date
Arizona		12/31/2014
California		12/31/2014

Personas: LO, Branch Manager, Referral Approval

Group Membership: All Users, LO, Branch Managers, 8201-CA Irvine (All), 8201-CA Irvine (BM), 8201-CA Processing Susan Green, 8201-CA LO Assistants (Show Asst), 8201-CA Processing Trevia Walker

Access to Subordinates' Loans: Access to all loans in the same level, View Only Edit, Edit Subordinates' Loans



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Disclosure Status Report



The Disclosure Status and Disclosure Performance reports are used to manage and view employee's status and performance on Disclosure review submissions.

Global settings in Unifyty define minimum pass requirements for the Performance Report.

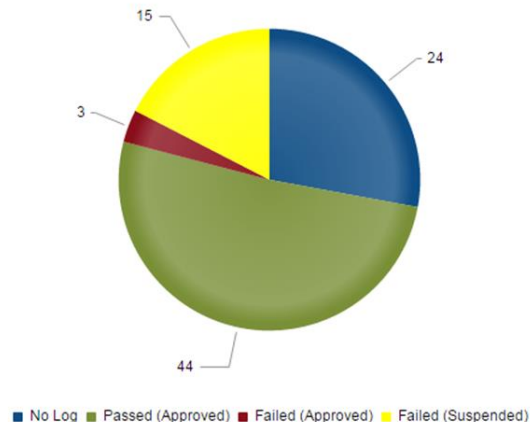
Disclosure Settings

Disclosure Requirement Count

Disclosure Requirement %

[Return to Dashboard](#)

Disclosure Performance Report



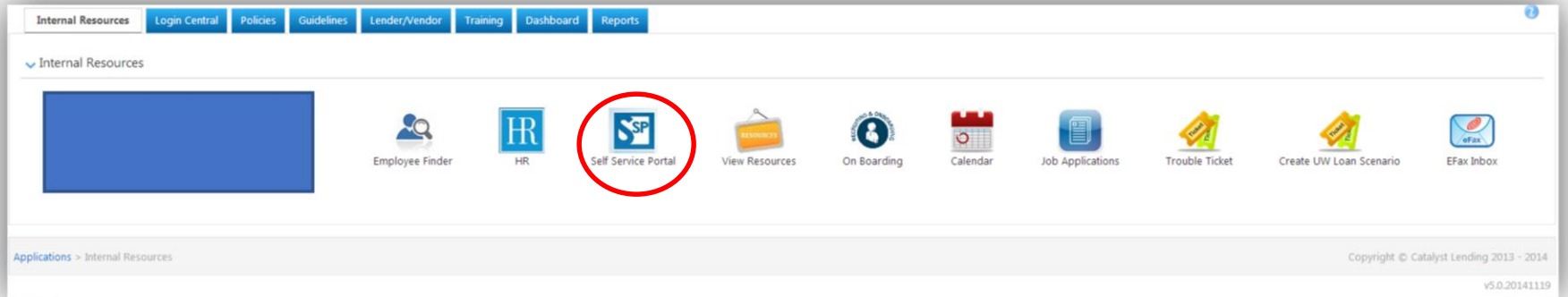
Integration with your LOS provides the ability to set Disclosure Review access based on performance. Notifications are automatically sent to the employee when their status changes.

This is a 2-way integration with the LOS taking Business Analytics to a new level.



LOS Integration

Employees can view their Disclosure Review details through the Self Service Portal.



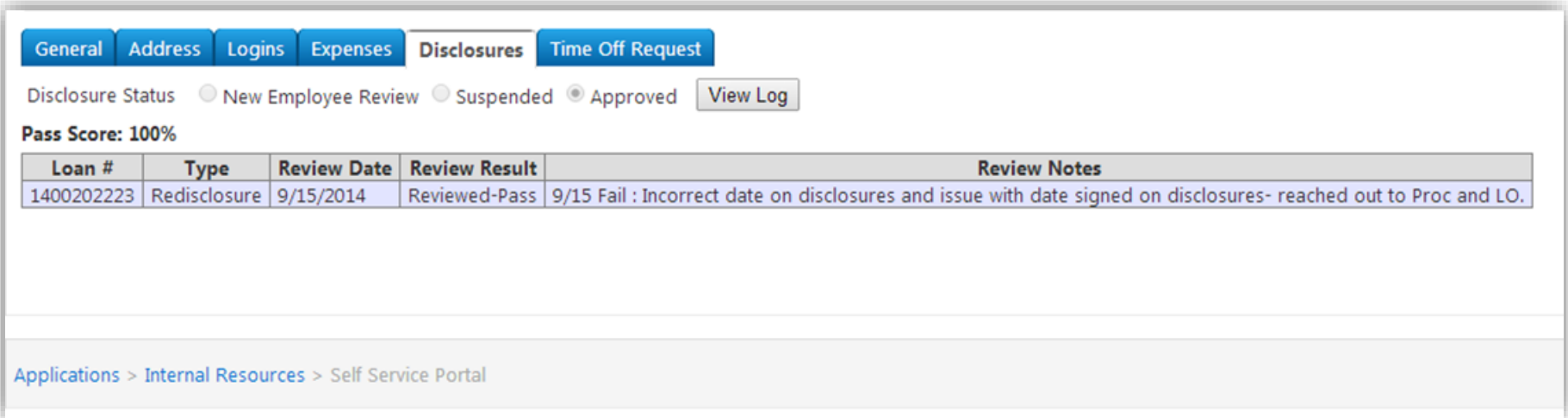
Internal Resources | Login Central | Policies | Guidelines | Lender/Vendor | Training | Dashboard | Reports

Internal Resources

Employee Finder | HR | **Self Service Portal** | View Resources | On Boarding | Calendar | Job Applications | Trouble Ticket | Create UW Loan Scenario | EFax Inbox

Applications > Internal Resources

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General | Address | Logins | Expenses | **Disclosures** | Time Off Request

Disclosure Status New Employee Review Suspended Approved

Pass Score: 100%

Loan #	Type	Review Date	Review Result	Review Notes
1400202223	Redisclosure	9/15/2014	Reviewed-Pass	9/15 Fail : Incorrect date on disclosures and issue with date signed on disclosures- reached out to Proc and LO.

Applications > Internal Resources > Self Service Portal

