

# INSTRUCTIONS FOR ONLINE REGISTRATION & LOCK-IN REQUEST

## Online Registration & New Loan Submission:

1. Click "Pipeline".



2. Click "Loan Registration" to enter the loan registration web page.

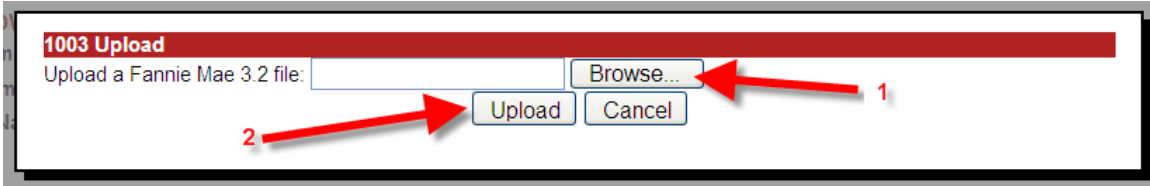


3. Upload a FNMA 3.2 File OR complete the loan information and click "Submit".

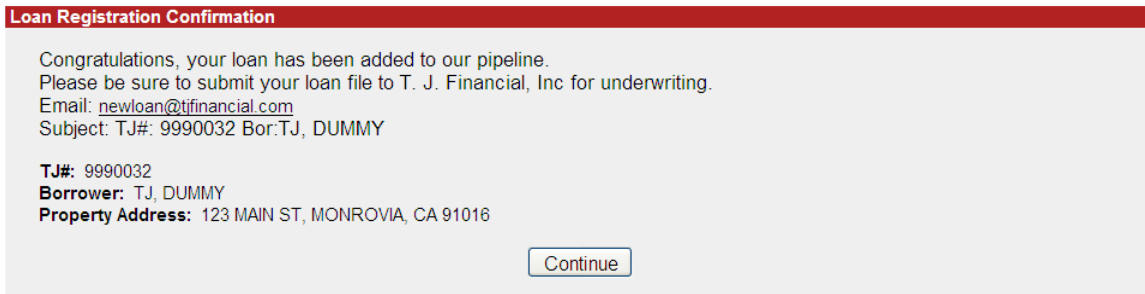
The screenshot shows the "Loan Registration" form. At the top right, there are buttons for "1003 Upload" and "Pipeline". A red arrow points to the "1003 Upload" button. The form is divided into several sections:

- CONTACT**: Fields for Contact, Email, and Comments.
- BORROWER**: Fields for Last Name, First Name, Middle Name, and SSN.
- SPOUSE**: Fields for Last Name, First Name, Middle Name, and SSN.
- PROPERTY ADDRESS**: Fields for Address #, Street, City, State (dropdown), and Zip.
- MAILING ADDRESS**: Fields for Address #, Street, City, State (dropdown), and Zip. Includes a checkbox "Same as Property Address".
- LOAN INFORMATION**: Fields for Loan Amount, Interest, Sales Price, Appraised Value, Program, Purpose, Property Type, Occupancy, and Document Type.
- GFE INFORMATION**: Fields for Open Date (pre-filled with 1/30/2013), F1003 Application Date, GFE Date, Estimate GFE Origination Charge (Block#1), TJ Fee (pre-filled with 920.00), Broker Origination Fee, and Actual GFE Origination Charge (Block#1) (pre-filled with 920.00).

At the bottom of the form are "Submit" and "Cancel" buttons. Below the form, it states: "Asterisk (\*) indicates required fields."



- The TJ loan number will appear in “Loan Registration Confirmation” & broker will receive a confirmation email with a printable “All-In-One” Form to be used for submission. Click “Continue” to return to your pipeline.



- If loan information was inputted manually in Step 3, please write the TJ loan number on the TJ All-in-One Form. If All-In-One Form was printed from email, it will already contain the loan number on the form. The complete package, including the All-In-One Form, must be emailed to [newloan@tjfinancial.com](mailto:newloan@tjfinancial.com) to complete the submission process.

**Lock-In Request for Existing Files in the Pipeline:**

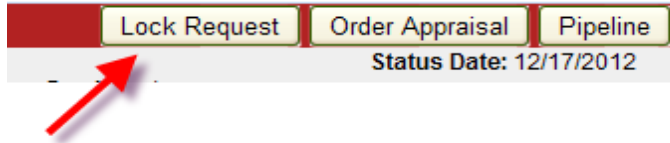
**\*\*\*NOTE: Web Lock-In is only available between 9am-10pm.\*\*\***

**To request a rate lock Extension, Re-lock, or to Change/Cancel an existing lock, please email: [lockin@tjfinancial.com](mailto:lockin@tjfinancial.com).**

- On the loan number, click “Actions” to enter “Loan Information” screen.

Loan Amount	Program	Purp	Actions
\$348,500.00	CF300	P	
\$311,000.00	CF300	RT	
\$172,500.00	CF300	CO	
\$310,000.00	CF300	RT	
\$250,000.00	CF300	CO	

2. Click “Lock Request”.



3. Complete the lock-in information & click “Submit”.

Lock Request Form [Back to Loan detail](#)

TJ Num: 2125926    TJ A/E: T. J. Financial , Inc.

**CONTACT**  
Lock By:\* ALEX    Phone: 626-599-9700  
Email:\* umanager@tjfinancial.com    Fax: 626-599-9704  
Comments:

**Borrower Information**  
Borrower: TEST, TEST  
Property Address: 106 HUNTINGTON, MONROVIA, CA 91016

**LOCK-IN INFORMATION**  
F1003  
Application Date: 12/20/2012  
Compensation:\*  Borrower Paid  Lender Paid  
Lender Paid %: 1.00    Lender Paid Max:  
Loan Amount:\* 100,000.00  
Program\* CF300  
Sales Price:  
Interest (%)\* 3.500  
Appraised Value:\* 200,000.00  
Length of Lock:\* (Select one)  
Subordinate Fin Amount:  
D FICO:\*  
LTV (%): 50.00  
CLTV (%): 50.00  
Document Type:\*  Full/Alt Doc.  
Property Type:\*  SFR  
 Condo  
 HR Condo  
 PUD  
 2U  
 3U  
 4U  
Purpose Of Loan:\*  Purchase  
 RT Refi.  
 Cash-out Refi.  
Occupancy:\*  Primary Residence  
 2nd Home  
 Investment

Asterisk (\*) indicates required fields.

4. The “Lock Request Confirmation” will appear on the next page. Click “Continue” to go back to the “Loan Information” page.

Lock Request Confirmation

Congratulations, your lock has been requested.  
We will reply to it within 24 hours.

TJ#: 2125926  
Borrower: TEST, TEST  
Property Address: 106 HUNTINGTON, MONROVIA 91016

**5. Broker can view the lock-in date & time in the “Lockin Information” screen**

Received Time	Requestor	Email	Loan Amount	Program	Base Rate
12/20/2012 11:02:02 AM	ALEX	umanager@tjfinancial.com	\$100,000.00	CF300	3.500 %

Date: 12/20/2012 11:08:06 AM

**6. TJ will process the lock-in request within 24 hours & email a Lock-in confirmation to Broker.**

**Advanced Lock-in Request:**

**1. Register the new loan online to show on the pipeline with status “Loan Registered”.**

T.J.#	Last Name	First Name	Status ▲	Sts Dt	Lock Dt	Exp Dt	Loan Amount	Program	Purp	Actions
2125926	TEST	TEST	Loan Registered				\$100,000.00	CF300	RT	

**2. Follow the instructions on “Lock-In Request for Existing Files in the Pipeline” to complete the Lock-in Request.**

**Pre-Approval Request:**

**\*\*\*NOTE: Pre-Approval is for borrower’s credit approval only. It does not require a subject property address, therefore, a GFE is not required. If subject property address is provided, please proceed with regular Loan Registration.\*\*\***

**1. Click “Pipeline”**



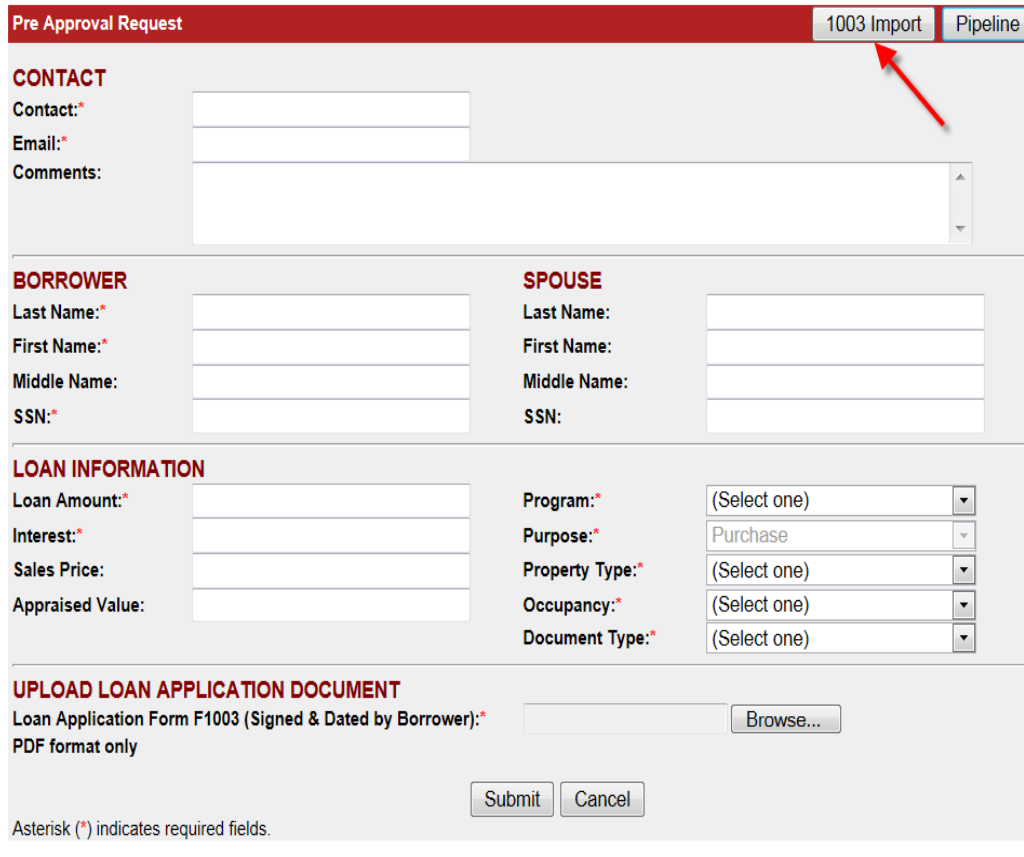
2. Click “Pre Approval” to enter the loan registration web page.



Pipeline Management Pre Approval Loan Registration

TJ Num:  Last Name:  Search Reset

3. Upload a FNMA 3.2 File OR complete the loan information



Pre Approval Request 1003 Import Pipeline

**CONTACT**  
Contact:\*   
Email:\*   
Comments:

**BORROWER**  
Last Name:\*   
First Name:\*   
Middle Name:   
SSN:\*

**SPOUSE**  
Last Name:   
First Name:   
Middle Name:   
SSN:

**LOAN INFORMATION**  
Loan Amount:\*  Program:\* (Select one)   
Interest:\*  Purpose:\* Purchase   
Sales Price:  Property Type:\* (Select one)   
Appraised Value:  Occupancy:\* (Select one)   
Document Type:\* (Select one)

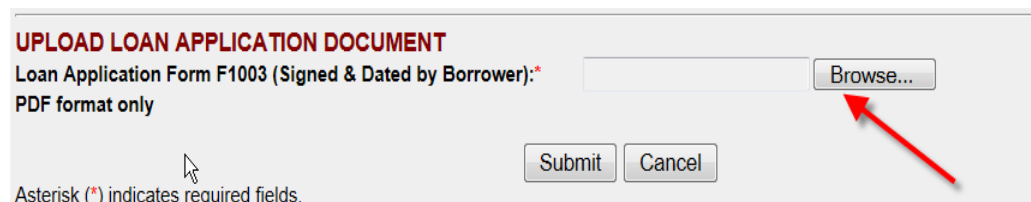
**UPLOAD LOAN APPLICATION DOCUMENT**  
Loan Application Form F1003 (Signed & Dated by Borrower):\*  Browse...  
PDF format only

Submit Cancel

Asterisk (\*) indicates required fields.

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4. Upload Loan Application Form 1003 (Signed & Dated by Borrower) & Click “Submit”



**UPLOAD LOAN APPLICATION DOCUMENT**  
Loan Application Form F1003 (Signed & Dated by Borrower):\*  Browse...  
PDF format only

Submit Cancel

Asterisk (\*) indicates required fields.

5. The TJ loan number will appear in “Loan Registration Confirmation” & broker will receive a confirmation email. TJ will reply the request within 24-48 hours. Click “Continue” to return to your pipeline.

**Pre Approval Request Confirmation**

Congratulations, your loan has been added to our pipeline.  
We will reply to it within 24~48 hours.

**TJ#:** 2132357

**Borrower:** CHEN, ALEX

Continue