



PRMG University™

LoanBeam

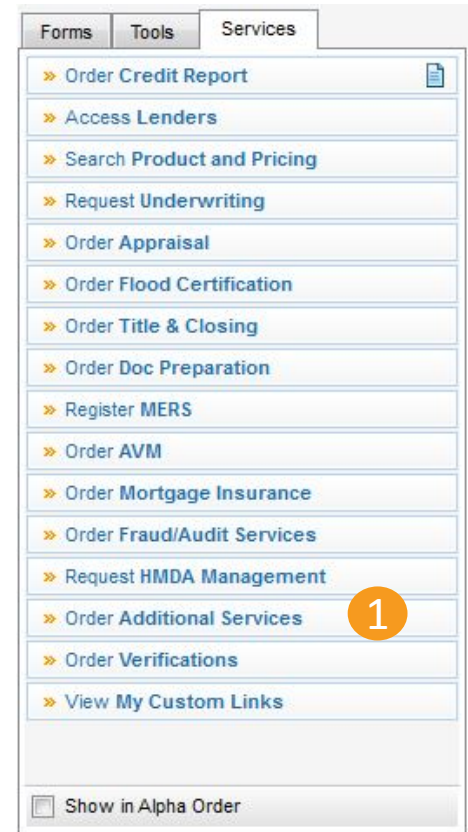
Topics Covered in this Training

1. Accessing LoanBeam
2. Understanding Tax Returns and Accompanying Schedules
3. Uploading Tax Returns to LoanBeam
4. Viewing Results

Working with Loan Beam

Accessing LoanBeam:

- Locate the Services tab locate Order Additional Services
1. Click Order Additional Services



Working with Loan Beam

Accessing LoanBeam:

- Access the All Providers and Tab and locate the Search by Company Name Text Box
1. Type LoanBeam in the Search by Company Name Text Box
 2. Click the Go Button

Additional Services

My Providers All Providers

Select the provider you wish to use and click Submit. To learn more about a provider, click the More info link next to the provider's name.

Search by Company Name: Go Reset

Appraisal Mailer	More info
C-Loans	More info
Cipher Data Resources Inc.	More info
CoreLogic ListSource	More info
CoreLogic Property Tax Estimator	More info
Ernst Smart Query Calculators	More info
FHA Connection - Address Validation	More info
FHA Connection - Appraisal Logging	More info
FHA Connection - Appraiser Lookup	More info
FHA Connection - CAIVRS Number	More info
FHA Connection - Case Check Holdings	More info
FHA Connection - Case Number Assignment	More info
FHA Connection - Case View Findings	More info

Add to My List New Provider Submit Cancel

Additional Services

My Providers All Providers

Select the provider you wish to use and click Submit. To learn more about a provider, click the More info link next to the provider's name.

Search by Company Name: LoanBeam Go

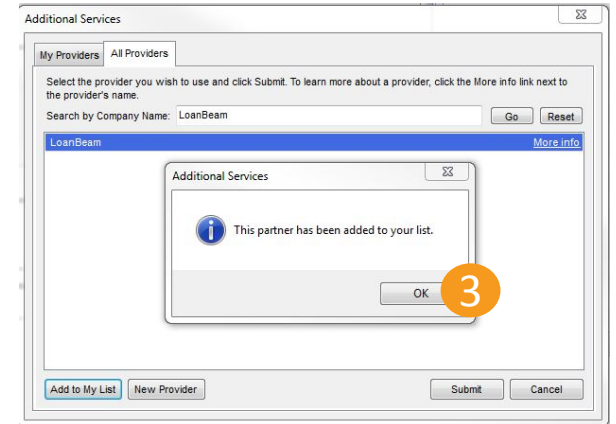
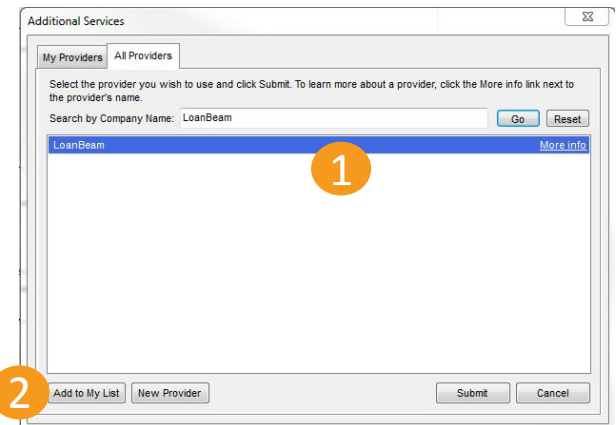
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Add to My List New Provider Submit Cancel

Working with Loan Beam

Accessing LoanBeam:

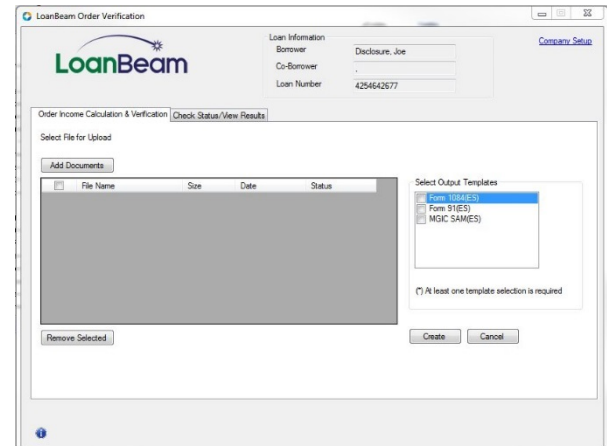
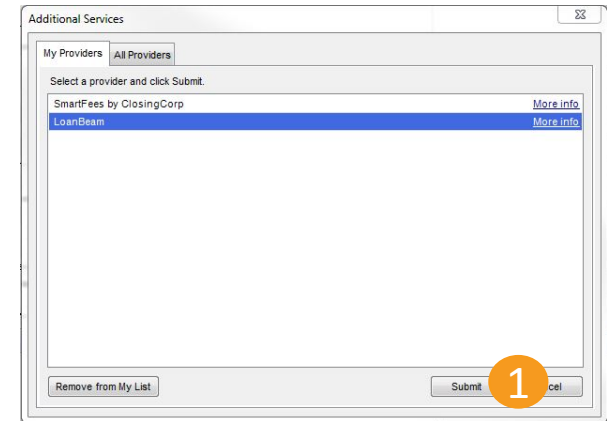
- LoanBeam will be the only item returning in the list
1. Click on the LoanBeam search result
 2. Click Add to My List
 3. An Additional Services PopUp window box will appear click OK



Working with Loan Beam

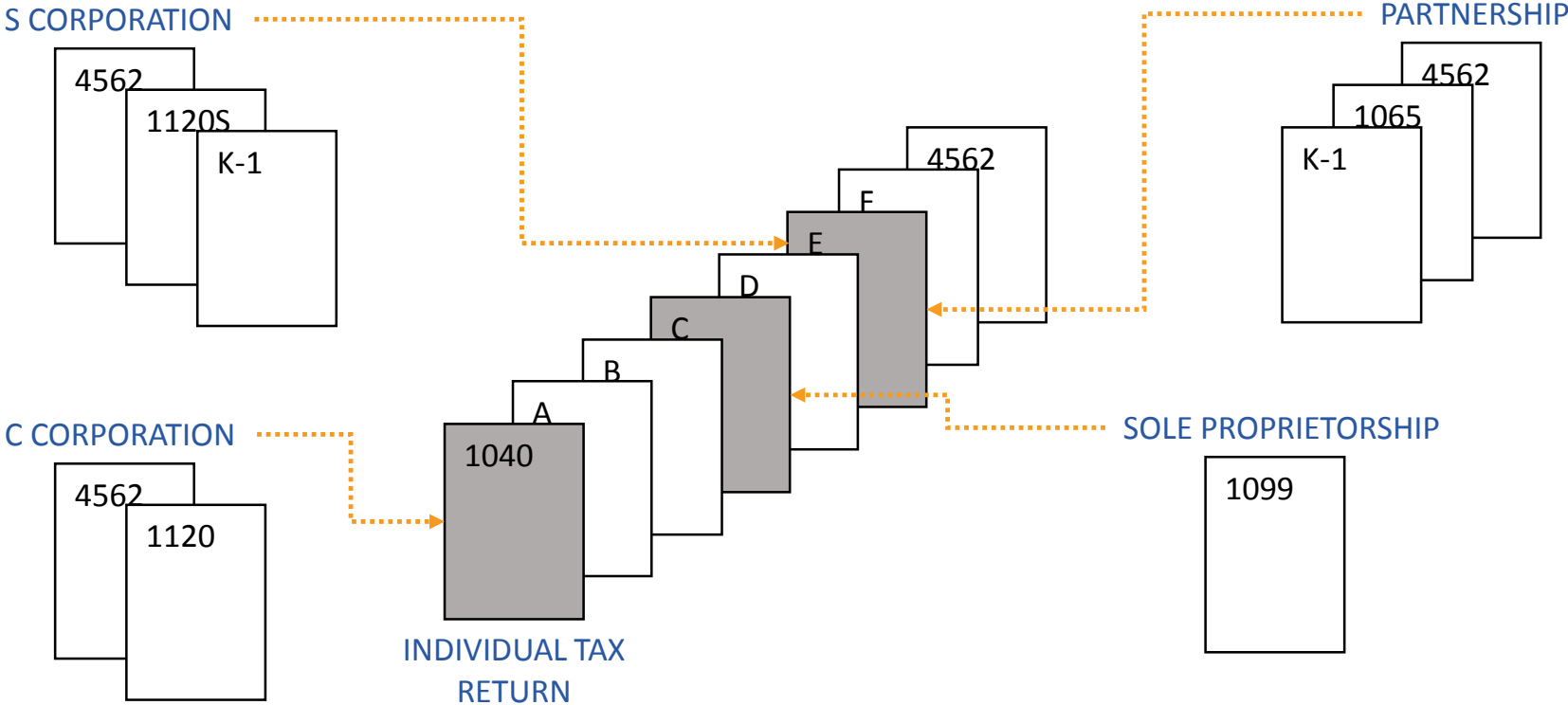
Accessing LoanBeam:

- Toggle between the All Providers Tab and the My Providers Tab and Select LoanBeam
1. Click Submit
 2. The Loan Beam Order Verification window will appear



Working with Loan Beam

Understanding Tax Returns and Accompanying Schedules:



*If borrower has commission income review 1040 and schedule A for 2106 expenses

Working with Loan Beam

Uploading Tax Returns to LoanBeam:

A. In the LoanBeam Window Locate the Add Documents Button

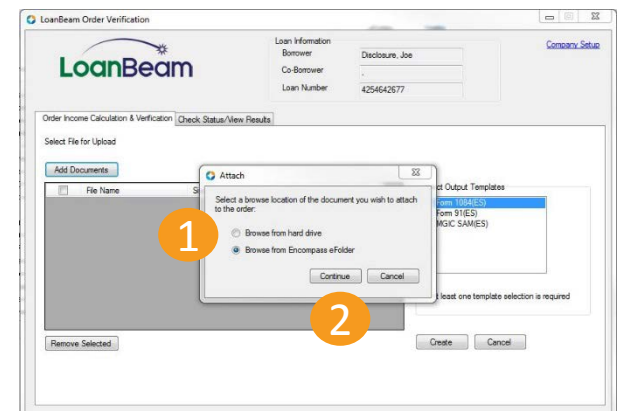
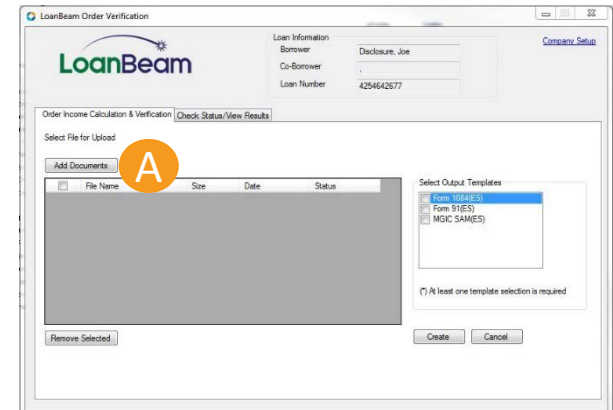
- The Add Documents Button Will allow you to access your tax returns by one of the following:

- Browse from Hard Drive
- Browse from Encompass eFolder (Preferred)

1. Select the location of your tax returns and include all pages all schedules

2. Click Continue

Note: When uploading tax returns both personal 1040s, Schedule Cs, business returns 1120, 1120S, 1065, K1s all pages all schedules no exceptions. Please make notations in the conversation log reflecting missing tax documents and accompanying schedules.

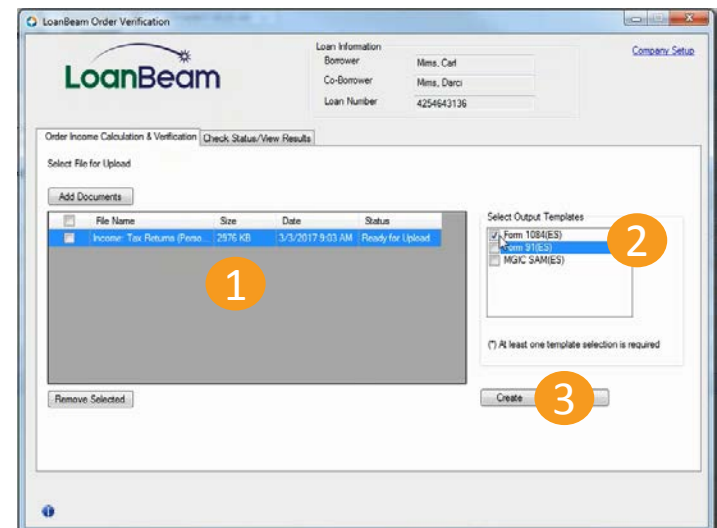
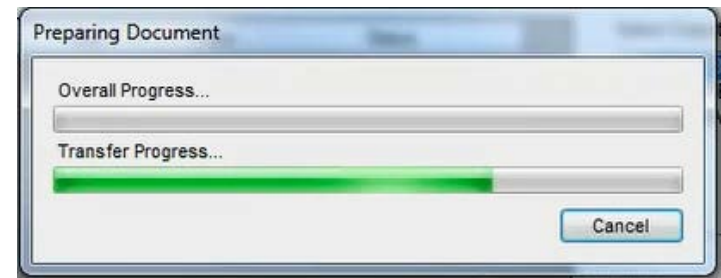


Working with Loan Beam

Uploading your Tax Returns to LoanBeam:

- Depending on the size of your tax return will determine how long it will take to process the upload
1. Once the Upload Process is complete you will see your recently uploaded documents in the list
 - Browse from Hard Drive
 - Browse from Encompass eFolder
 2. Locate the Select Output Templates checkboxes and select one of the following
 - For Fannie Mae Loans Select Form 1084(ES)
 - For Freddie Mac Loans Select Form91(ES)
 3. Click Create

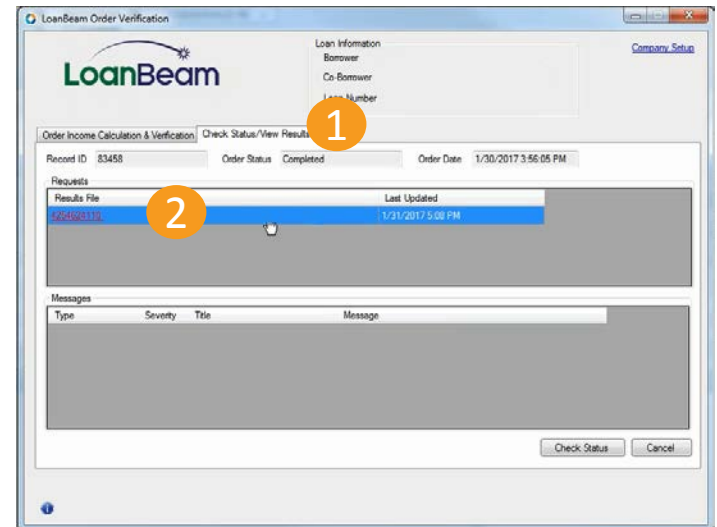
Please Note: You can select both Fannie Mae form 1084 and Freddie Mac form 91 if desired



Working with Loan Beam

Viewing Results:

- Locate the Check Status/View Results Tab in the mid upper portion of the LoanBeam Window
1. Click on the Check Status/View Results Tab
 2. Click the Red Results file link





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Questions?

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