#### Purpose

The purpose of this work instruction is to provide procedure on how to add a coborrower to a loan package.

#### Trigger

Perform this procedure when the primary borrower elects to have a co-borrower on the loan request.

#### Prerequisites

- Borrower and Co-Borrower must provide an application fee of \$100.00.
- Borrower and Co-Borrower must both sign the CCC-185 when submitted.
- Borrower and Co-Borrower must both submit supporting documents for seperate financial analysises.
- Loan package must be created with a Primary Borrower.
- Review procedure on how to create a loan request.

#### **Helpful Hints**

- "xxxx" within a document represents a variable, which may consist of a name, number, etc.
- In the field description tables, **R** indicates the action is required, **O** indicates the action is optional, and **C** indicates the action is conditional.
- The following notes may be used throughout this work instruction:

Note type	Icon	Description
A <b>general</b> note of information	<b>f</b>	This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A cautionary note		Use this note to communicate to the end-user of something that <b>MUST</b> be completed or another trigger that should be started and is related to the procedure.

Acritical note	8	Use this note to specify something that <b>MUST NOT</b> be done during the procedure.
Contact someone	C	Use this icon to specify to the end- user the need to initiate a communication within the organization due to an event in the procedure.
A <b>reference</b> is available	$\mathbf{P}$	Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.

## Procedure

1. This procedure begins on the application fee tab in the loan request package.

## **DLS-FSFL Add Application Fee**

			1		Care of Statistics		3	
DLS Home   About DLS	<u> </u>	<u> </u>	<u> </u>		out of eAuth			
DLS Admin ▼ Select	Customer ▼	LS-Das	hboard	Transactio	n Manager	Acquisition	s Repo	rts
Cust omer:				Case #				
Customer Management								
Loan Making			А	pplicati	on Fee			
Process Application								
Checklist	Loan Info	App Fee	RE					
Credit Decision - (FBP)	All required fields	All required fields are denoted by an asterisk ( * ).						
Customer Profile	Application D	Application Details						
Loan Request Status		Date Received: 04/28/2017 Request Type: FS Fiscal Year: 2017						
History	Application Fe			1- •			_	
Transaction Status History	Payment Date	Remitter Name	Amount	e Remittance Type	FSA Office	Check/Item Number	Payment Amount	Status
LS -	04/28/2017	DOE, JANE	\$100.00	Check	FREDERICK, MD	786696	\$100.00	Success
Transfer/Assumption LS - Dashboard FSFL Loan Servicing	Total Applica Total Application Total A		e: \$100.00					
Special Servicing	Add Payment							
Transactions								

2. Click Add Payment

USDA United States Department of Agriculture FSA - Farm Loan Programs - Direct Loan Making				
DLS Home About DLS				
DLS Admin V Select	t Customer ▼ LS-Dashboard Transaction Manager Acquisitions Reports			
Customer	: Cd50 #:			
Customer Management				
Loan Making	Application Fee			
Process Application				
Checklist				
Credit Decision - (FBP)	Loan Info App Fee			
Customer Profile	All required fields are denoted by an asterisk (*).			
Loan Request Status History	Remittance Details         * Remitter Name:         Select         * Remittance Amount:			
Transaction Status	* Remittance Type: Select   * Check/Item Number:			
History	* Remittance State: Select 🗸 * Remittance County: Select 🗸			
LS - Transfer/Assumption	* Office: Select 🗸			
LS - Dashboard	Payment Type: Application Fee V			
FSFL Loan Servicing	Payment Details			
Special Servicing	* Payment Amount:			
Transactions	* Payment Date: 📃 🗾			
	Submit Cancel			
uild Version:DLS-LoanMaking- Home   FSA Internet   FSA In	Maven-web-4.8.2 Build Date:(Apr-28-2017 10:09 AM)			

**DLS-FSFL Application Fee Remitter Name** 

3. Click Remitter Name: dropdown list .



Remitter is the name on the check.

It can be different than the borrower.

DLS Home   About DLS DLS Admin ▼   Select			
Customer	t Customer ▼ LS-Dashboard Transaction Manager Acquisitions Reports		
Customer	Case #:		
Customer Management			
Loan Making	Application Fee		
Process Application			
Checklist			
Credit Decision - (FBP)	Loan Info App Fee		
Customer Profile	All required fields are denoted by an asterisk (*).		
Loan Request Status	Remittance Details		
History	* Remitter Name: Select * Remittance Amount:		
Transaction Status	* Remittance Type: Select from SCIMS		
History	* Remittance State: Select 🗸 * Remittance County: Select 🗸		
LS -	* Office: Select 🗸		
Transfer/Assumption	Payment Type		
LS - Dashboard	Payment Type: Application Fee 🗸		
FSFL Loan Servicing	Payment Details		
Special Servicing	* Payment Amount:		
Transactions	* Payment Date:		
	Submit Cancel		

**DLS-FSFL** Application Fee Remitter Name

4. Click Select from SCIMS.



You can search using SCIMS to select a remitter other than borrower.

Remitter must have valid TIN in SCIMS.

	USDA United States Department of Agriculture FSA - Farm Loan Programs - Direct Loan Making				
DLS Home About DL					
	t Customer ▼   LS-Dashboard   Transaction Manager   Acquisitions   Reports				
Cust ome	r: Case #:				
Customer Management					
Loan Making	Application Fee				
Process Application					
Checklist					
Credit Decision - (FBP)	Loan Info App Fee				
Customer Profile	All required fields are denoted by an asterisk (*).				
Loan Request Status History	Remittance Details         * Remitter Name:       DOE, JOHN         * Remittance Amount:				
Transaction Status	* Remittance Type: Select   * Check/Item Number:				
History	* Remittance State: Select 🗸 * Remittance County: Select 🗸				
LS - Transfer/Assumption	* Office: Select V				
LS - Dashboard	Payment Type: Application Fee				
FSFL Loan Servicing	Payment Details				
Special Servicing	* Payment Amount:				
Transactions	* Payment Date:				
	Submit Cancel				
uild Version:DLS-LoanMaking Home   FSA Internet   FSA I	-Maven-web-4.8.2 Build Date:(Apr-28-2017 10:09 AM)				

**DLS-FSFL** Application Fee Remittance Amount

5. Click Remittance Amount text box.

	USDA United States Department of Agriculture FSA - Farm Loan Programs - Direct Loan Making			
DLS Home About DLS				
	t Customer 🔻 🛛 LS-Dashboard 🛛 Transaction Manager 🗍 Acquisitions 🗍 Reports			
Customer	Case #:			
Customer Management				
Loan Making	Application Fee			
Process Application				
Checklist				
Credit Decision - (FBP)	Loan Info App Fee			
Customer Profile	All required fields are denoted by an asterisk ( * ).			
Loan Request Status History	Remittance Details         * Remitter Name: DOE, JOHN         * Remittance Amount:			
Transaction Status	* Remittance Type: Select   * Check/Item Number:			
History	* Remittance State: Select 🗸 * Remittance County: Select 🗸			
LS -	* Office: Select V			
Transfer/Assumption	Payment Type			
LS - Dashboard	Payment Type: Application Fee 🗸			
FSFL Loan Servicing	Payment Details			
Special Servicing	* Payment Amount:			
Transactions	* Payment Date:			
	Submit Cancel			
ild Version:DLS-LoanMaking-	Maven-web-4.8.2 Build Date:(Apr-28-2017 10:09 AM)			

### **DLS-FSFL** Application Fee Remittance Amount

6. As required, complete/review the following fields:

Field	R/O/C	Description
Remittance Amount	R	<b>Example:</b> 100.00

The remittance amount should equal the amount received from the remitter.

Example: The amount on the check.

USDA United States D FSA - Fa	apartment of Agriculture I'm Loan Programs - Direct Loan Making
	DLS ►   Other FSA ▼   Help   Contact Us   Logout of eAuth
	ect Customer ▼   LS-Dashboard   Transaction Manager   Acquisitions   Reports
Cust	mer: Case #:
Customer Manageme	ht
Loan Making	Application Fee
<b>Process Application</b>	
Checklist	
Credit Decision - (FI	P) Loan Info App Fee
Customer Profile	All required fields are denoted by an asterisk ( * ).
Loan Request Status History	Remittance Details         * Remitter Name:       DOE, JOHN         * Remittance Amount:       100.00
Transaction Status	* Remittance Type: Select   * Check/Item Number:
History	* Remittance State: Select 🗸 * Remittance County: Select 🗸
LS - Transfer/Assumptior	* Office: Select V
LS - Dashboard	Payment Type: Application Fee V
FSFL Loan Servicing	Payment Details
Special Servicing	* Payment Amount:
Transactions	* Payment Date:
	Submit Cancel
uild Version:DLS-LoanMak Home   FSA Internet   FS	ng-Maven-web-4.8.4-SNAPSHOT Build Date:(May-08-2017 11:02 AM)

**DLS-FSFL Application Fee Remittance Type** 

7. Click Remittance Type dropdown list .

	USDA United States Department of Agriculture FSA - Farm Loan Programs - Direct Loan Making			
DLS Home About DLS				
	t Customer ▼ LS-Dashboard Transaction Manager Acquisitions Reports			
Cust omer	Case #:			
Customer Management				
Loan Making	Application Fee			
Process Application				
Checklist				
Credit Decision - (FBP)	Loan Info App Fee			
Customer Profile	All required fields are denoted by an asterisk ( * ).			
Loan Request Status	Remittance Details			
History	* Remitter Name: DOE, JOHN * Remittance Amount: 100.00			
Transaction Status	* Remittance Type: Select * Check/Item Number:			
History	* Remittanœ State: Cashier's Check * Remittanœ County: Select V			
LS -	* Office: Multi-Party Check Money Order			
Transfer/Assumption	Payment Type Check Wire			
LS - Dashboard	Payment Type: Application Fee 🗸			
FSFL Loan Servicing	Payment Details			
Special Servicing	* Payment Amount:			
Transactions	* Payment Date: 📃 🛃			
	Submit Cancel			
uild Version:DLS-LoanMaking- Home   FSA Internet   FSA In	Maven-web-4.8.4-SNAPSHOT Build Date:(May-08-2017 11:02 AM)			

**DLS-FSFL** Application Fee Remittance Type

8. Click Check

United States Depart	ment of Agriculture Loan Programs - Direct Loan Making
DLS Home About DLS	
DLS Admin V Select	t Customer V LS-Dashboard Transaction Manager Acquisitions Reports
Customer	Cd50 #:
Customer Management	
Loan Making	Application Fee
Process Application	
Checklist	
Credit Decision - (FBP)	Loan Info App Fee
Customer Profile	All required fields are denoted by an asterisk ( * ).
Loan Request Status History	Remittance Details         * Remitter Name: DOE, JOHN         * Remittance Amount: 100.00
Transaction Status	* Remittance Type: Check   * Check/Item Number:
History	* Remittance State: Select 🗸 * Remittance County: Select 🗸
LS - Transfer/Assumption	* Office: Select V
LS - Dashboard	Payment Type
	Payment Type: Application Fee 🗸
FSFL Loan Servicing	Payment Details
Special Servicing	* Payment Amount:
Transactions	* Payment Date:
	Submit Cancel
uild Version:DLS-LoanMaking- Home   FSA Internet   FSA In	Maven-web-4.8.2 Build Date:(Apr-28-2017 10:09 AM)

## **DLS-FSFL** Application Fee Check/Item Number

**9.** As required, complete/review the following fields:

Field	R/O/C	Description
* Check/Item Number:		<b>Example:</b> 987560



This field is grayed out when "Cash" has been selected.

USDA United States Depart FSA - Farm	Iment of Agriculture Loan Programs - Direct Loan Making
DLS Home About DLS DLS Admin ▼ Selec	S ►   Other FSA ▼   Help   Contact Us   Logout of eAuth   t Customer ▼   LS-Dashboard   Transaction Manager   Acquisitions   Reports
Cust ome	
Customer Management	
Loan Making	Application Fee
Process Application	
Checklist	
Credit Decision - (FBP)	Loan Info App Fee
Customer Profile	All required fields are denoted by an asterisk ( * ).
Loan Request Status History	Remittance Details         * Remitter Name:       DOE, JOHN         * Remittance Amount:       100.00
Transaction Status	* Remittance Type: Check   * Check/Item Number: 987560 ×
History	* Remittance State: Select 🗸 * Remittance County: Select 🗸
LS - Transfer/Assumption	* Office: Select 🗸
LS - Dashboard	Payment Type: Application Fee
FSFL Loan Servicing	Payment Details
Special Servicing	* Payment Amount:
Transactions	* Payment Date:
	Submit Cancel
Build Version:DLS-LoanMaking- Home   FSA Internet   FSA Ir	Maven-web-4.8.4-SNAPSHOT Build Date:(May-08-2017 11:02 AM)

## **DLS-FSFL Application Fee Remittance State**

10. Click Remittance State dropdown list.

United States Depart FSA - Farm	ment of Agriculture Loan Programs - Direct Loan Making
DLS Home   About DLS	
DLS Admin ▼ Select	t Customer 🔻 🛛 LS-Dashboard 🛛 Transaction Manager 🗍 Acquisitions 🖉 Reports
Customer	Case #:
Customer Management	
Loan Making	Application Fee
Process Application	
Checklist	
Credit Decision - (FBP)	Loan Info App Fee
Customer Profile	All required fields are denoted by an asterisk ( * ).
Loan Request Status	Remittance Details
History	* Remitter Name: DOE, JOHN
Transaction Status	* Remittance Type: Check 🗸 * Check/Item Number: 987560
History	* Remittance State: Select * Remittance County: Select V
LS -	* Office: Select the State
Transfer/Assumption	Payment Type
LS - Dashboard	Payment Type: Application Fee 🗸
FSFL Loan Servicing	Payment Details
Special Servicing	* Payment Amount:
Transactions	* Payment Date:
	Submit Cancel
uild Version:DLS-LoanMaking-	Maven-web-4.8.4-SNAPSHOT Build Date:(May-08-2017 11:02 AM)

### **DLS-FSFL** Application Fee Remittance State

#### 11. Click Maryland

A

The remittance state is where the application fee was accepted in.

Note: Borrowers can only submit an application fee in states they are associated with.

11	U U
United States Depart FSA - Farm	ment of Agriculture Loan Programs - Direct Loan Making
DLS Home About DLS	
DLS Admin ▼ Select	t Customer ▼   LS-Dashboard   Transaction Manager   Acquisitions   Reports
Customer	Case #:
Customer Management	
Loan Making	Application Fee
Process Application	
Checklist	
Credit Decision - (FBP)	Loan Info App Fee
Customer Profile	All required fields are denoted by an asterisk ( * ).
Loan Request Status	Remittance Details
History	* Remitter Name: DOE, JOHN   * Remittance Amount: 100.00
Transaction Status	* Remittance Type: Check
History	* Remittance State: Maryland V * Remittance County: Select V
LS -	* Office: Select 🗸
Transfer/Assumption	Payment Type
LS - Dashboard	Payment Type: Application Fee 🗸
FSFL Loan Servicing	Payment Details
Special Servicing	* Payment Amount:
Transactions	* Payment Date : 🔤
	Submit Cancel
uild Version:DLS-LoanMaking-	Maven-web-4.8.4-SNAPSHOT Build Date:(May-08-2017 11:02 AM)

**DLS-FSFL Application Fee Remittance County** 

12. Click Remittance County dropdown list.

USDA United States Depart FSA - Farm	nent of Agriculture Loan Programs - Direct Loan Making	
DLS Home   About DLS DLS Admin ▼   Select	S ►   Other FSA ▼   Help   Contact Us   Logout of eAuth   Customer ▼   LS-Dashboard   Transaction Manager   Acquis	itions Reports
Qust omer		
Customer Management		
Loan Making	Application Fee	
Process Application		
Checklist		
Credit Decision - (FBP)	Loan Info App Fee	Select Allegany
Customer Profile	All required fields are denoted by an asterisk ( * ).	Anne Arundel
Loan Request Status History	Remittance Details * Remitter Name: DOE, JOHN  * Remittance Ame	Baltimore Calvert ount: Caroline Carroll
Transaction Status	* Remittance Type: Check	
History	* Remittance State: Maryland 🗸 * Remittance Co	unty: Dorchester
LS - Transfer/Assumption	* Office: Select V Payment Type	Frederick Garrett Harford
LS - Dashboard	Payment Type: Application Fee V	Howard Kent
FSFL Loan Servicing	Payment Details	Montgomery Prince George's
Special Servicing	* Payment Amount:	Queen Anne's St. Mary's
Transactions	* Payment Date :	Somerset Talbot
	Submit Cancel	Washington Wicomico
uild Version:DLS-LoanMaking- Home   FSA Internet   FSA In	Maven-web-4.8.4-SNAPSHOT Build Date:(May-08-2017 11:02 AM)	Baltimore

## **DLS-FSFL** Application Fee Remittance County

13. Click Frederick

H

The remittance county is the county where the application fee was accepted.

	rtment of Agriculture n Loan Programs - Direct Loan Making
DLS Home About D	
	ct Customer ▼   LS-Dashboard   Transaction Manager   Acquisitions   Reports
Cust om	er: Case #:
Customer Management	
Loan Making	Application Fee
Process Application	
Checklist	
Credit Decision - (FBP	) Loan Info App Fee
Customer Profile	All required fields are denoted by an asterisk (*).
Loan Request Status History	Remittance Details         * Remitter Name: DOE, JOHN         * Remittance Amount: 100.00
Transaction Status	* Remittance Type: Check   * Check/Item Number: 987560
History	* Remittance State: Maryland V * Remittance County: Frederick V
LS - Transfer/Assumption	* Office: Select
LS - Dashboard	Payment Type Payment Type: Application Fee V
FSFL Loan Servicing	Payment Details
Special Servicing	* Payment Amount:
Transactions	* Payment Date:
	Submit Cancel
Build Version:DLS-LoanMaking Home   FSA Internet   FSA	-Maven-web-4.8.4-SNAPSHOT Build Date:(May-08-2017 11:02 AM)

**DLS-FSFL Applicaiton Fee Office Selection** 

14. Click Office dropdown list .

United States Depart FSA - Farm	ment of Agriculture Loan Programs - Direct Loan Making
DLS Home About DLS	
DLS Admin ▼ Selec	t Customer ▼ LS-Dashboard Transaction Manager Acquisitions Reports Case #:
Customer	Cdse#:
Customer Management	
Loan Making	Application Fee
Process Application	
Checklist	
Credit Decision - (FBP)	Loan Info App Fee
Customer Profile	All required fields are denoted by an asterisk ( * ).
Loan Request Status	Remittance Details
History	* Remitter Name: DOE, JOHN  * Remittance Amount: 100.00
Transaction Status	* Remittance Type: Check   Check   Check/Item Number: 987560
History	* Remittance State: Maryland V * Remittance County: Frederick V
LS -	* Office: Select
Transfer/Assumption	Payment Type
LS - Dashboard	Payment Type: Application Fee 🗸 Select the Office
FSFL Loan Servicing	Payment Details
Special Servicing	* Payment Amount:
Transactions	* Payment Date:
	Submit Cancel
uild Version:DLS-LoanMaking-	Maven-web-4.8.4-SNAPSHOT Build Date:(May-08-2017 11:02 AM)

## **DLS-FSFL Application Fee Office Selection**

15. Click FREDERICK COUNTY FARM SERVICE AGENCY

The office is the Service Center associated with the State and County selected.

USDA United States Depart FSA - Farm	ment of Agriculture Loan Programs - Direct Loan Making
DLS Home   About DL	
DLS Admin ▼ Selec	t Customer V   LS-Dashboard   Transaction Manager   Acquisitions   Reports
Customer Management	
Loan Making	Application Fee
Process Application	
Checklist	
Credit Decision - (FBP)	Loan Info App Fee
Customer Profile	All required fields are denoted by an asterisk ( * ).
Loan Request Status History	Remittance Details         * Remitter Name:       DOE, JOHN         * Remittance Amount:       100.00
Transaction Status	* Remittance Type: Check    * Check/Item Number: 987560
History	* Remittance State: Maryland 🗸 * Remittance County: Frederick 🗸
LS - Transfer/Assumption	* Office: FREDERICK COUNTY FARM SERVICE AGENCY
LS - Dashboard	Payment Type
FSFL Loan Servicing	Payment Type: Application Fee  Payment Details
Special Servicing	* Payment Amount:
Transactions	* Payment Date :
	Submit Cancel
ild Version:DLS-LoanMaking- Home   FSA Internet   FSA Ir	Maven-web-4.8.4-SNAPSHOT Build Date:(May-08-2017 11:02 AM)

### **DLS-FSFL** Application Fee Payment Amount

## **16.** As required, complete/review the following fields:

Field	R/O/C	Description
* Payment Amount:	R	<b>Example:</b> 100.00



Payment Amount is the amount going towards the application fee.

USDA United States Depart	ment of Agriculture Loan Programs - Direct Loan Making
DLS Home About DLS	
DLS Admin ▼ Select	t Customer ▼ LS-Dashboard Transaction Manager Acquisitions Reports Case #:
Customer	
Customer Management	
Loan Making	Application Fee
Process Application	
Checklist	
Credit Decision - (FBP)	Loan Info App Fee
Customer Profile	All required fields are denoted by an asterisk ( * ).
Loan Request Status	Remittance Details
History	* Remitter Name: DOE, JOHN * Remittance Amount: 100.00
Transaction Status	* Remittance Type: Check
History	* Remittance State: Maryland V * Remittance County: Frederick V
LS -	* Office: FREDERICK COUNTY FARM SERVICE AGENCY 🗸
Transfer/Assumption	Payment Type
LS - Dashboard	Payment Type: Application Fee 🗸
FSFL Loan Servicing	Payment Details
Special Servicing	* Payment Amount: 100.00
Transactions	* Payment Date:
	Submit Cancel
uild Version:DLS-LoanMaking-	Maven-web-4.8.4-SNAPSHOT Build Date:(May-08-2017 11:02 AM)

### **DLS-FSFL Application Fee Payment Date**

## **17.** As required, complete/review the following fields:

Field	R/O/C	Description
* Payment Date:	R	
		Example: 04/28/2017

The Payment Date is the date the payment was received in the Service Center.

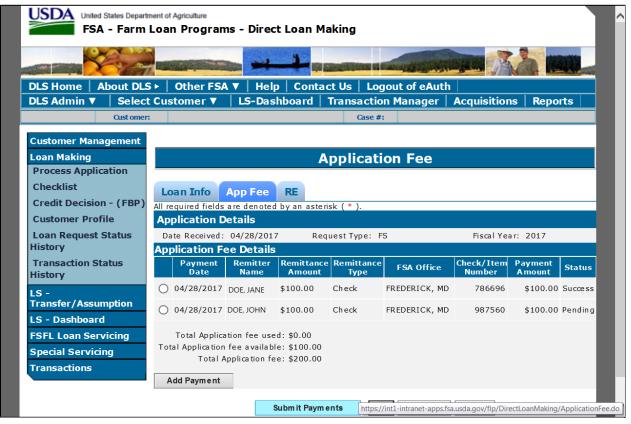
	Loan Programs - Direct Loan Making		
DLS Home   About DLS	5 ►   Other FSA ▼   Help   Contact Us   Logout of eAuth		
DLS Admin ▼  Select	t Customer 🔻 🛛 LS-Dashboard 🗧 Transaction Manager 🗍 Acquisitions 🗧 Reports 👘		
Customer	: Case #:		
Customer Management			
Loan Making	Application Fee		
Process Application			
Checklist			
Credit Decision - (FBP)	Loan Info App Fee		
Customer Profile	All required fields are denoted by an asterisk (*).		
Loan Request Status	Remittance Details		
History	* Remitter Name: DOE, JOHN * Remittance Amount: 100.00		
Transaction Status	* Remittance Type: Check    * Check/Item Number: 987560		
History	* Remittance State: Maryland V * Remittance County: Frederick V		
LS -	* Office: FREDERICK COUNTY FARM SERVICE AGENCY 🗸		
Transfer/Assumption	Payment Type		
LS - Dashboard	Payment Type: Application Fee 🗸		
FSFL Loan Servicing	Payment Details		
Special Servicing	* Payment Amount: 100.00		
Transactions	* Payment Date: 04/28/2017		
	Submit Cancel		

## **DLS-FSFL Submit Application Fee Remittance Details**

18. Click Submit

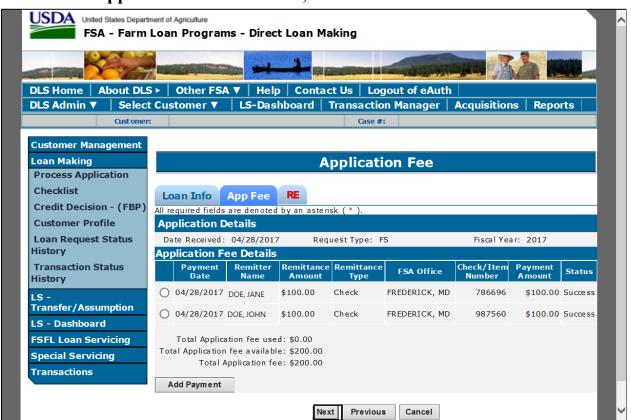
Clicking "Submit" will save the remittance information.

#### **DLS-FSFL Submit Application Fees**



19. Click Submit Payments

It is **Critical** that all application fee details are correct prior to submitting payments.



#### **DLS-FSFL** Application Fee is Success; continue to RE tab

#### **20.** Perform one of the following:

If	Then	Go To
	Click the <b>RE</b> Tab or <b>Next</b> to continue to Related Entities Information.	<u>Step 21</u>
	Click Next.	<u>Step 21</u>

## **DLS-FSFL Add Related Entity**

	Real Property lies				THE REAL PROPERTY AND		
DLS Home   About DLS	i ►   Oti	her FSA 1			Logout of eAut		
DLS Admin ▼ Select	Custon	ner ▼	LS-Dashb	oard Transa	ction Manager	Acquisitions	Reports
Cust omer:				0	ase #:		
Customer Management							
.oan Making				Relate	ed Entities		
Process Application Checklist	Loan			æ			
Credit Decision - (FBP) Customer Profile			te Received: ( e Payments: 2			Request Type: FS Fiscal Year: 201	7
Loan Request Status History	Relate	d Entity	Informatio	on :			
Transaction Status History	Select	Related Entity Name	Tax ID	Borrower Type	Payn	nent Details	Share %
-S - Fransfer/Assumption		DOE, JANE	12345678	Primary	Select		▶ 100.00
S - Dashboard							Add
SFL Loan Servicing				Submit RE	Previous Canc	el	
Special Servicing				Jubilitite	Call		
Transactions							

- **21.** Click Add to add another Related Entity.
  - Once user clicks "Add" the SCIMS Search Page will be displayed. You will select the related entity needed.

## **DLS-FSFL Related Entity Borrower Type**

	AND AND A	Contract Name of			The Distance of Stational Station				
DLS Home About DLS	i⊧   Ot	her FSA	▼ Help	Contact Us	Logout of eAut	h			
DLS Admin ▼   Select	Custo	ner 🔻 🛛			ction Manager		Reports		
Cust omer				G	ise #:				
Customer Management									
Loan Making				Relate	d Entities				
Process Application	Loan Info App Fee RE								
Checklist		ation De							
Credit Decision - (FBP) Customer Profile		Date Received: 04/28/2017 Request Type: FS No. of available Payments: 2 Fiscal Year: 2017							
Loan Request Status	NO	. OF a valia D	ie Payments.	2		fiscal feat. 201.			
History	Relat	ed Entity	Informatio	on :					
Transaction Status History	Select	Related Entity Name	Tax ID	Borrower Type	Paym	ent Details	Share %		
LS - Transfer/Assumption		DOE, JANE	12345678	P rim a ry	Select		✓ 100.00		
LS - Dashboard	0	DOE, JOHN	98765432	Select 🗸	Select		$\mathbf{\mathbf{\vee}}$		
FSFL Loan Servicing									
Special Servicing							Add		
Transactions				Submit RE	Previous Cance				

**22.** Click the Borrower Type dropdown list for JOHN DOE.

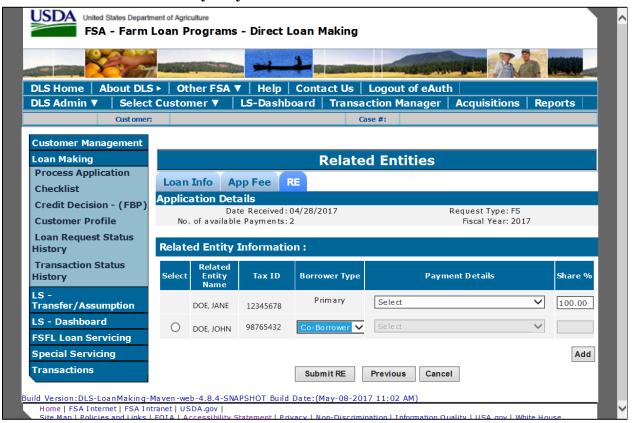
When related entity is selected from SCIMS, user returns to Related Entities Screen.

A

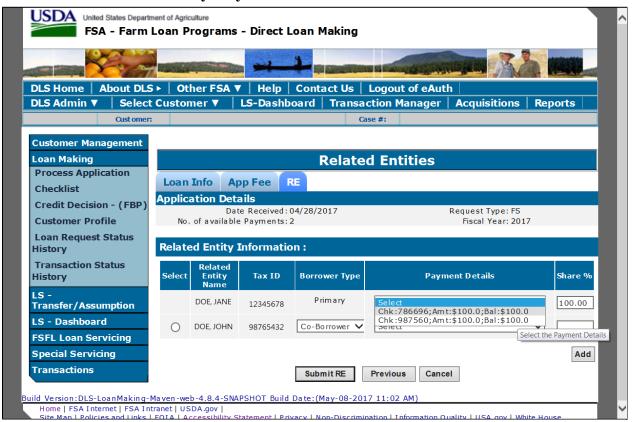
# **DLS-FSFL Related Entity Co-Borrower**

DLS Home About		ther FSA					
	ect Custo				Logout of eAut ction Manager	n   Acquisitions	Reports
Cust o					ase #:		
Customer Manageme	nt						
Loan Making				Relate	d Entities		
Process Application Checklist		Info A		RE			
Credit Decision - (FE Customer Profile	P)	Da	te Received : e Payments :	· · · ·		Request Type: FS Fiscal Year: 201	7
Loan Request Status History	Relat	ed Entity	Informatio	on :			
Transaction Status History	Select	Related Entity Name	Tax ID	Borrower Type	Payn	nent Details	Share %
LS - Transfer/Assumption		doe, jane	12345678	P rim a ry	Select		✓ 100.00
LS - Dashboard	0	DOE, JOHN	98765432	Select	Select		$\mathbf{\vee}$
FSFL Loan Servicing	_	202,00111		Co-Borrower Co-Signer	-		
Special Servicing				Guarantor			Add
Transactions				Submit RE	Previous Canc	el	

23. Click Co-Borrower.

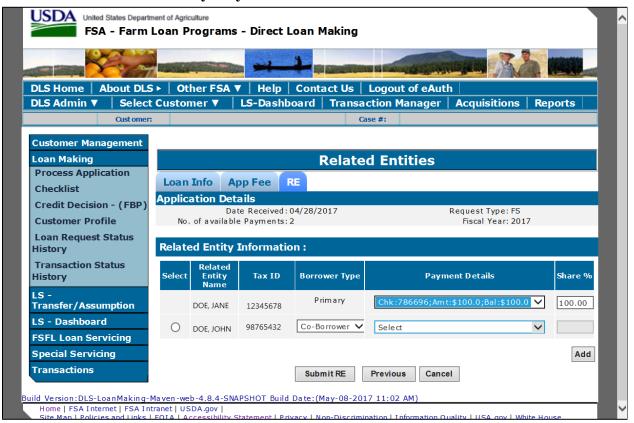


24. Click the Payment Details dropdown list for Jane Doe the Primary Borrower.

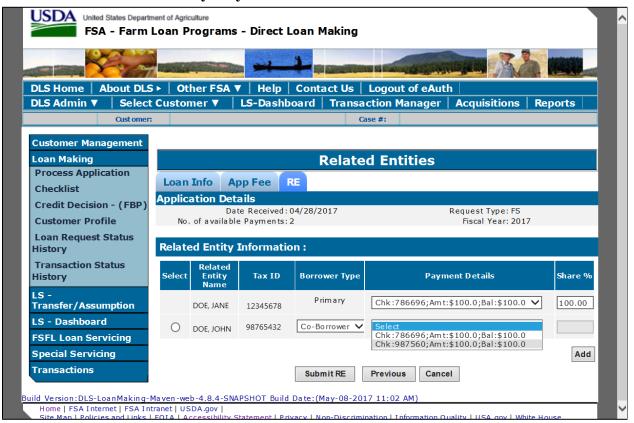


**25.** Click the applicable payment detail for the primary borrower from the drop down list.

Chk:786696;Amt:\$100.0;Bal:\$100.0



26. Click the Payment Details dropdown list for John Doe the Co-Borrower.



27. Click the applicable payment detail for the Co-Borrower from the drop down list. Chk:987560;Amt:\$100.0;Bal:\$100.0

## **DLS-FSFL Related Entity Shares**

					THE REAL PROPERTY AND			
DLS Home   About D		ther FSA		Contact Us	Logout of eAut			
DLS Admin ▼ Sele	ct Custo	mer ▼	LS-Dashb		action Manager	Acquisitions	Reports	
Customer Management								
Loan Making				Relate	ed Entities			
Process Application Checklist	Loar	Loan Info App Fee RE						
Credit Decision - (FBP	Applic	Application Details						
Customer Profile	·	Date Received: 04/28/2017 Request Type: FS No. of available Payments: 2 Fiscal Year: 2017						
Loan Request Status History	Relat	Related Entity Information :						
Transaction Status History	Select	Related Entity Name	Tax ID	Borrower Type	Payr	nent Details	Share %	
LS - Transfer/Assumption		DOE, JANE	12345678	P rim a ry	Chk:786696;Amt	:\$100.0;Bal:\$100.0	✔ 100.00	
LS - Dashboard	0	DOE, JOHN	98765432	Co-Borrower 🗸	Chk:987560;Amt	:\$100.0;Bal:\$100.0	$\checkmark$	
FSFL Loan Servicing								
Special Servicing Transactions							Add	

## **28.** As required, complete/review the following fields:

Field	R/O/C	Description
Primary Share	R	
		<b>Example:</b> 50

## **DLS-FSFL Related Entity Shares**

		Bride State	Contract Report		1	THE REAL PROPERTY AND		
DLS Home   A	bout DLS	►   Ot	her FSA	▼   Help	Contact Us	Logout of eAut	h	
DLS Admin 🔻	Select	Custo	ner 🔻 🛛	LS-Dashb	oard   Transa	ction Manager	Acquisitions	Reports
	Cust omer:				0	ase #:		
Customer Mana	gement							
Loan Making					Relate	d Entities		
Process Applica	ation	Loan	Info A	pp Fee	RE			
Checklist			ation De					
Credit Decision	· · · ·		Da	ate Received:	1 1 1 I I I I I I I I I I I I I I I I I		Request Type: FS	
Customer Profi		No	. of availab	le Payments:	2		Fiscal Year: 2017	
Loan Request S History	tatus	Relat	ed Entity	Informatio	on :			
Transaction Sta History	itus	Select	Related Entity Name	Tax ID	Borrower Type	Payn	nent Details	Share %
LS - Transfer/Assum	nption		DOE, JANE	12345678	P rim a ry	Chk : 786696; Am t	:\$100.0;Bal:\$100.0	✓ 50
LS - Dashboard		0	DOE, JOHN	98765432	Co-Borrower 🗸	Chk:987560;Amt	:\$100.0;Bal:\$100.0	✓
FSFL Loan Serv	icing	Ŭ	000,00111					
Special Servicin	g							Add
Transactions					Submit RE	Previous Canc	el	

## **29.** As required, complete/review the following fields:

Field	R/O/C	Description
Co-Borrower Share	R	<b>Example:</b> 50



The share percentages must equal 100%.

## **DLS-FSFL Submit Related Entities**

	N HIGHNAN	-			IN REPORTED STREET				
LS Home   About DLS	5 ►   Ot	her FSA V	▼   Help	Contact Us	Logout of eAut	h			
LS Admin ▼ Selec	t Custo	mer 🔻	LS-Dashb	oard   Transa	ction Manager	Acquisitions	Reports		
Cust omer				G	ise #:				
Customer Management									
oan Making				Relate	d Entities				
Process Application Checklist	Loan	Loan Info App Fee RE							
Credit Decision - (FBP)	Applic	Application Details Date Received: 04/28/2017 Request Type: FS							
Customer Profile	No	No. of available Payments: 2 Fiscal Year: 2017							
Loan Request Status listory	Relat	Related Entity Information :							
Transaction Status listory	Select	Related Entity Name	Tax ID	Borrower Type	Payn	nent Details	Share %		
S - ransfer/Assumption		doe, jane	12345678	P rim a ry	Chk:786696;Amt	:\$100.0;Bal:\$100.0	✓ 50		
S - Dashboard SFL Loan Servicing	0	DOE, JOHN	98765432	Co-Borrower 🗸	Chk:987560;Amt	:\$100.0;Bal:\$100.0	<b>∨</b> 50		
pecial Servicing							Add		
ransactions				Submit RE	Previous Cance	al			

**30.** Click Submit RE once all related entity information has been complete.

It is **Critical** that the user select the payment details correctly, prior to selecting "Submit RE". Payment Details cannot be changed once submitted.

For more details regarding related entities for multiple remittances, refer to 2-FSFL, paragraph 62.

## Result

You have successfully completed and submitted the Related Entities. The facility, farm production, & disposition tabs will become available.

FSFL\_Coborrower

# **Next Steps**

You will complete the facility tab.