

Job Aid ChaseLoanManager- Register/Lock

Introduction Complete the steps below to Register and/or Lock a loan in ChaseLoanManager:

	Step	Action
Create Loan	1	Select the Create Loan tab or button from the ChaseLoanManager home page.
	2	Complete all applicable fields (required fields are in yellow) via upload or manual entry.
	3	Select the Register/Lock button on the bottom of the screen.
Register/ Lock	4	Select a choice from the Duplicate Loan search (when applicable).
	5	Complete the Correspondent Seller Information section.
	6	Complete the Borrower Information section.
	7	Complete the Property Information and Purpose of Loan section.
	8	Complete the Mortgage Type and Loan Terms section.
	9	Complete the Product Selection section: <ol style="list-style-type: none"> a. Select the Documentation Type b. Select the Lock Period (optional leave blank to view all available lock periods) c. Enter the Requested Rate (optional leave blank to view all available rates) d. Select the Product e. Click on the (+) to Expand and view the available rates and prices for the selected product. f. Select the Rate
	10	Select Register Float or Lock Loan in the Pricing Details section.