

## Job Aid ChaseLoanManager- ZiPPY<sup>SM</sup>

### Introduction

Complete the steps below to run a loan through Automated Underwriting (ZiPPY) in ChaseLoanManager:

### Create Loan

Step	Action
1	Select the <b>Create Loan</b> 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 <b>Underwrite with ZiPPY</b> button on the bottom of the screen.
4	Select a choice from the <b>Duplicate Loan</b> search (when applicable).
5	Complete all applicable fields (required fields are in yellow) on the <b>1003</b> .
6	Select the <b>Save Changes</b> button. NOTE: Any incomplete fields must be completed prior to proceeding.
7	Select <b>AU Submission (ZiPPY)</b> from the Quick Links on the left.
8	Select the <b>Automated Underwriting System</b> and <b>Underwriting Type</b> .
9	Select a <b>Product</b> from the <b>Loan Information</b> section.
10	Complete the <b>Borrower Information</b> section: <ol style="list-style-type: none"> <li>Select the <b>Occupation</b> type</li> <li>Select the <b>Credit Report Type</b></li> <li>Enter the <b>Credit Reference #</b> if re-issuing credit</li> </ol>
11	Complete the <b>Credit Information</b> section: <ol style="list-style-type: none"> <li>Select the <b>Credit Agency</b></li> <li>Select the <b>Credit Action</b></li> <li>Select if you would like to <b>Merge Liabilities</b> (only recommended if liabilities were NOT on the FNM file upload)</li> </ol>
12	Select the <b>Submit Order</b> button.
13	Select <b>AU Findings</b> from the Quick Links on the left after the findings have been received.
14	Select the finding you would like to view: <ul style="list-style-type: none"> <li>ZiPPY<sup>SM</sup></li> <li>DU<sup>®</sup></li> <li>LP<sup>®</sup></li> <li>Credit Report</li> </ul>

### Underwrite with ZiPPY

### View Findings