

# How to Assign, Retrieve and Release a Loan in Loan Product Advisor<sup>®</sup>

The information contained in this resource applies to Loan Product Advisor<sup>®</sup> (LPA<sup>SM</sup>) users that access LPA using Freddie Mac Gateway portal, whether you are entering data directly into the interface or importing data from your system.

The following information will assist you on the process of how to assign a loan, recall an assigned loan, retrieve an assigned loan, and how to release a loan through Loan Product Advisor, whether you are a lender, third-party originator (TPO) or Aggregator.

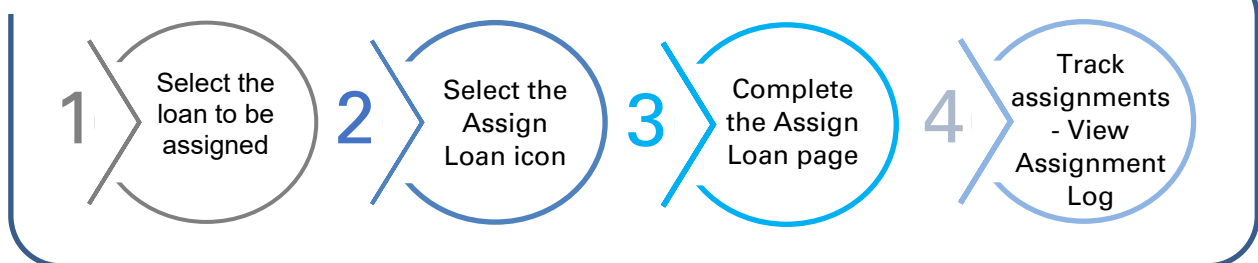
- [How to assign a loan](#)
- [How to recall a loan that was assigned](#)
- [How to retrieve assigned loans](#)
- [How to release a loan](#)

## How to Assign a Loan

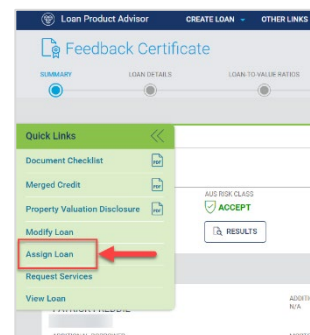
The Assign Loan feature allows TPOs, lenders and housing counselors to assign loans to participating lenders, wholesalers, mortgage service providers (MSPs), and housing counselors. Once a loan is assigned, it can be viewed and modified by the assigned organization. The assigning organization can no longer modify and can only view transactions previously submitted under their organization. There is always just one version of the loan with current data and LPA results.

The following process flow provides a summary view of the loan assignment process from a TPO to an applicable third-party.

### Process

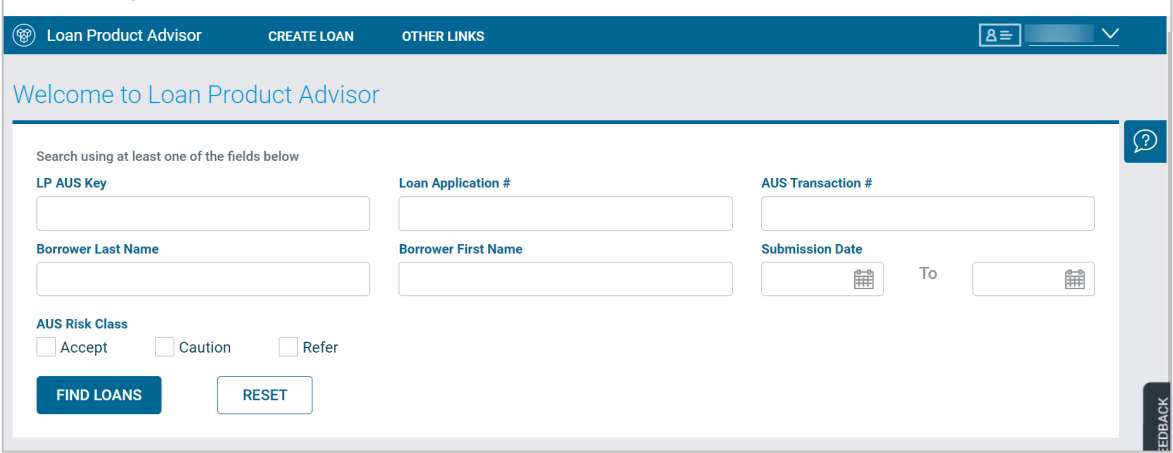
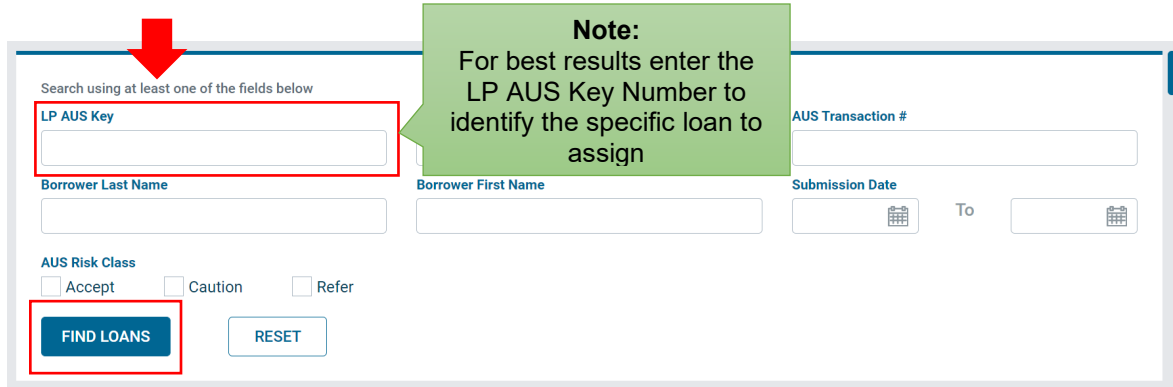
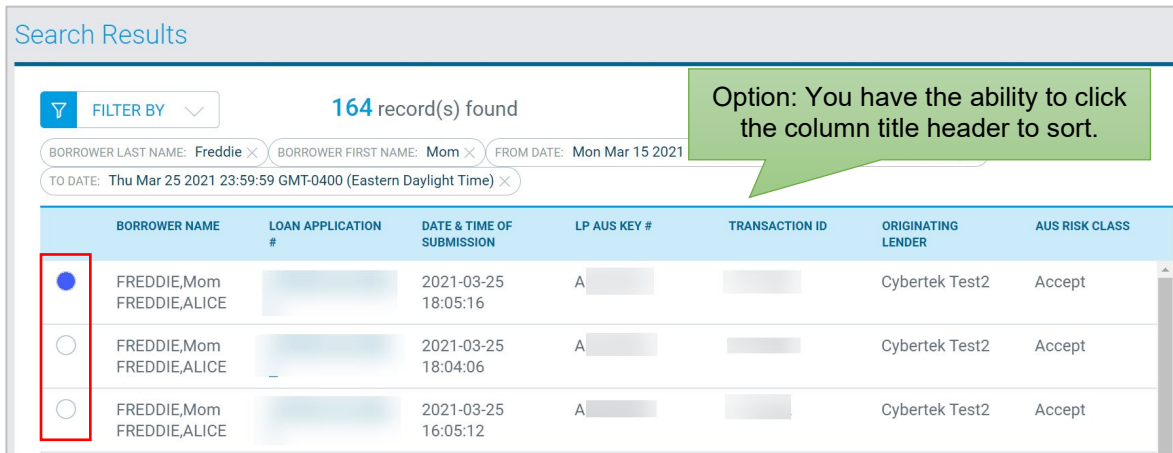


You also have the option to access the Assign Loan functionality from the **Quick Links** menu on the Feedback Certificate page.






**Note:** Vertical revision bars " | " are used in the margin of this reference to highlight these new requirements and significant changes.

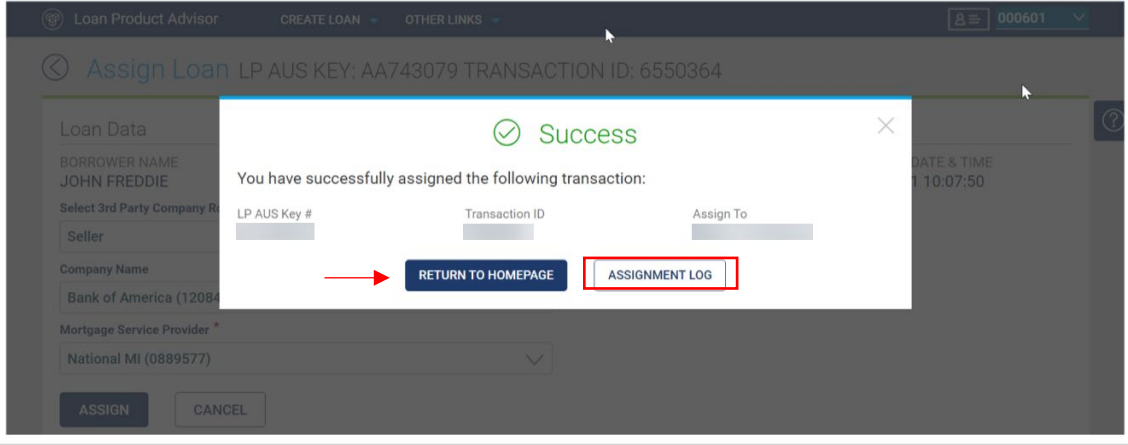
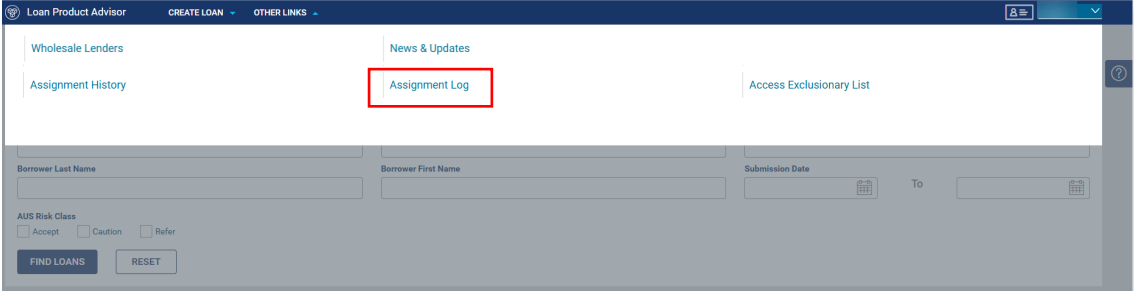


Steps	Results
1. After logging into Loan Product Advisor, the <b>Welcome to Loan Product Advisor</b> page displays.	
2. Enter the appropriate search criteria to select the loan to be assigned. Select <b>Find Loans</b> to begin the search.	
3. Select the loan to be assigned.  You have the option to sort the search results by any column. Select the column to sort.	<p>Once the loans display that meet your search criteria, select the loan to be assigned.</p> 



Steps	Results																
4. Once you select the loan to be assigned, the right-side slider appears. Click the <b>Assign Loan</b> icon on the slider.	<div><table><tr><th>BORROWER NAME</th><th>LOAN APPLICATION #</th><th>DATE &amp; TIME OF SUBMISSION</th><th>LP AUS KEY #</th><th>TRANSACTION ID</th><th>ORIGINATING LENDER</th><th>AUS RISK CLASS</th></tr><tr><td><input checked="" type="radio"/> FREDDIE,Mom FREDDIE,ALICE</td><td></td><td>2021-03-25 18:05:16</td><td>A</td><td></td><td></td><td></td></tr></table><p><b>Tip:</b> If the <b>Assign Loan</b> icon does not display in the right-side slider, simply <b>resubmit</b> the loan and the <b>Assign Loan</b> icon will display.</p></div>	BORROWER NAME	LOAN APPLICATION #	DATE & TIME OF SUBMISSION	LP AUS KEY #	TRANSACTION ID	ORIGINATING LENDER	AUS RISK CLASS	<input checked="" type="radio"/> FREDDIE,Mom FREDDIE,ALICE		2021-03-25 18:05:16	A					
BORROWER NAME	LOAN APPLICATION #	DATE & TIME OF SUBMISSION	LP AUS KEY #	TRANSACTION ID	ORIGINATING LENDER	AUS RISK CLASS											
<input checked="" type="radio"/> FREDDIE,Mom FREDDIE,ALICE		2021-03-25 18:05:16	A														
5. The <b>Assign Loan</b> page appears. Complete the <b>Assign Loan</b> page and click <b>Assign</b> .	<div><div><div>1. For <b>Select User/Role Type</b>, select the entity you wish to assign to. For example, if assigning to an aggregator, select Seller.</div><div><div>Loan Product AdvisorCREATE LOANOTHER LINKS</div><div><div>Loan Data</div><table><tr><th>BORROWER NAME</th><th>LOAN APPLICATION #</th><th>ORIGINATING COMPANY NAME</th><th>ASSESSED DATE &amp; TIME</th></tr><tr><td>Dad Freddie</td><td></td><td>Test TPO</td><td>2021-03-14 8:03:21</td></tr></table><div><div>Select User/Role Type *</div><div>Select</div></div><div><div>Mortgage Service Provider</div><div>Select</div></div><div><div>ASSIGN</div><div>CANCEL</div></div></div></div></div><div><div>2. The <b>Company Name</b> field will display once a User/Role type has been selected. Select the company you wish to assign the transaction to.</div><div><b>Note:</b> You can find a <b>Company Name</b> by typing the first letters of the company's name in the field.</div><div><div>Loan Data</div><table><tr><th>BORROWER NAME</th><th>LOAN APPLICATION #</th><th>ORIGINATING COMPANY NAME</th><th>ASSESSED DATE &amp; TIME</th></tr><tr><td>FREDDIE</td><td></td><td>Cybertek Test 2</td><td>2021-03-24 12:38:48</td></tr></table><div><div>Select User/Role Type *</div><div>Seller</div></div><div><div>Company Name *</div><div>Select</div></div><div><div>Mortgage Service Provider</div><div>Select</div></div><div><div>ASSIGN</div><div>CANCEL</div></div></div></div></div> <div><div>3. <b>If applicable:</b> If you are assigning a loan to a wholesaler/Mortgage Service Provider pair, select a mortgage service provider from the drop down box.</div><div><b>Note:</b> The <b>Mortgage Service Provider</b> field is a dynamic field. You do not need to select a mortgage service provider if not applicable.</div></div>	BORROWER NAME	LOAN APPLICATION #	ORIGINATING COMPANY NAME	ASSESSED DATE & TIME	Dad Freddie		Test TPO	2021-03-14 8:03:21	BORROWER NAME	LOAN APPLICATION #	ORIGINATING COMPANY NAME	ASSESSED DATE & TIME	FREDDIE		Cybertek Test 2	2021-03-24 12:38:48
BORROWER NAME	LOAN APPLICATION #	ORIGINATING COMPANY NAME	ASSESSED DATE & TIME														
Dad Freddie		Test TPO	2021-03-14 8:03:21														
BORROWER NAME	LOAN APPLICATION #	ORIGINATING COMPANY NAME	ASSESSED DATE & TIME														
FREDDIE		Cybertek Test 2	2021-03-24 12:38:48														



Steps	Results
<p>6. Once you Assign the loan a “Success” confirmation message appears. Two options display, select:</p> <ul style="list-style-type: none"><li>• Return to the <b>Home Page</b>, or</li><li>• Access the <b>Assignment Log</b> Page (refer to Step 7 below).</li></ul>	<div data-bbox="386 359 1507 800"></div> <p><b>Reminder:</b> The <b>assigning</b> organization can <b>no longer modify</b> and can only view transactions previously submitted under their organization.</p>
<p>7. The <b>Assignment Log</b> page may also be accessed from <b>Other Links</b> (located on the <b>Loan Product Advisor</b> navigation bar).</p>	<div data-bbox="375 936 1502 1224"></div>



8. The **Assignment Log** page appears. The page displays loans that have been assigned to you under the **Assigned To Me** tab and loans that have been assigned by you under the **Assigned By Me** tab.

Loan Product Advisor

CREATE LOAN

OTHER LINKS

Assignment Log

FILTER BY

13 record(s) found

Assigned To Me

Assigned By Me

COMPANY NAME	ASSIGNMENT DATE/TIME	LP KEY #	TRANSACTION ID	RISK CLASS	ASSIGNED MSP
<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	<div>2024-10-31 11:40:24</div> <div>2024-04-03 15:43:58</div> <div>2024-04-03 15:33:33</div> <div>2024-04-03 8:27:27</div> <div>2024-04-01 16:55:39</div> <div>2024-04-01 16:49:50</div> <div>2024-04-01 15:55:46</div> <div>2024-04-01 10:13:40</div> <div>2024-03-28 15:43:18</div> <div>2024-03-26 17:19:08</div>			<div>Accept</div> <div>Accept</div> <div>Accept</div> <div>Accept</div> <div>Accept</div> <div>Accept</div> <div>Accept</div> <div>Accept</div> <div>Caution</div> <div>Accept</div>	<div>--</div> <div>--</div> <div>--</div> <div>--</div> <div>--</div> <div>--</div> <div>--</div> <div>--</div> <div>--</div> <div>--</div>

1 - 10 of 13 items

10

25

50

ALL

<

>

1

2

>>

**Note:** The entries in the **Assignment Log** are listed in chronological order, with the most recent loan file submission listed first.

**Note:** When you click the **Filter By** option, you can add search criteria. Enter search criteria and select **Apply Filter** to see updated results.

Loan Product Advisor

CREATE LOAN

OTHER LINKS

Assignment Log

FILTER BY

13 record(s) found

LPA AUS Key

Transaction ID

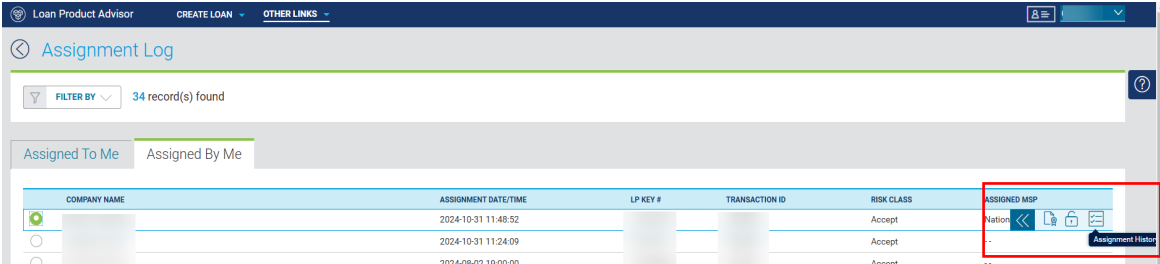
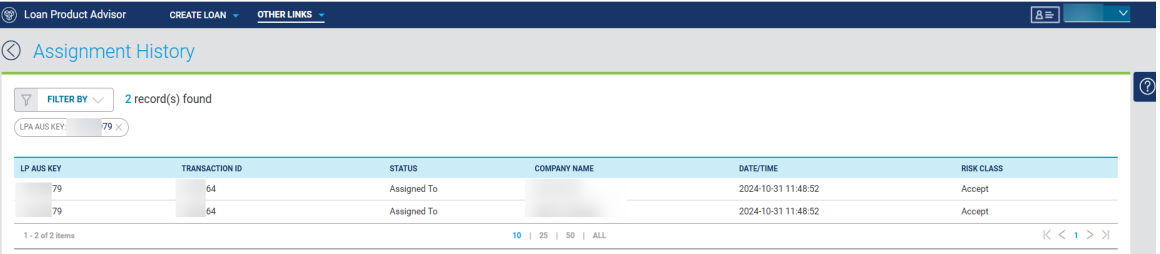
Company ID

Date From-To

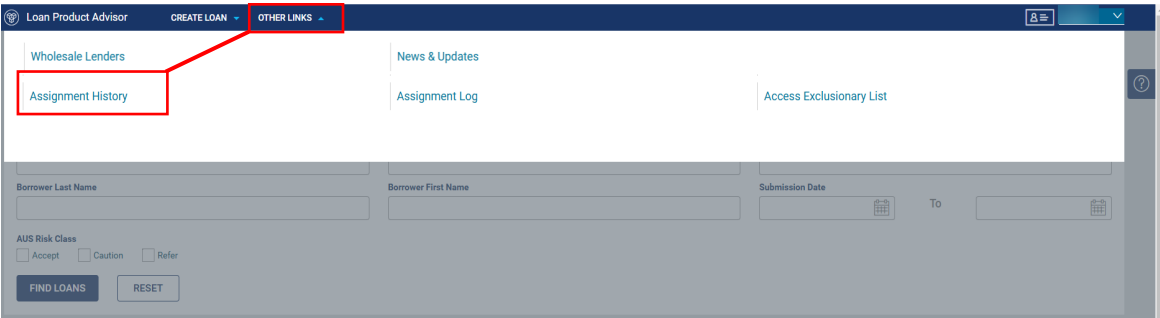
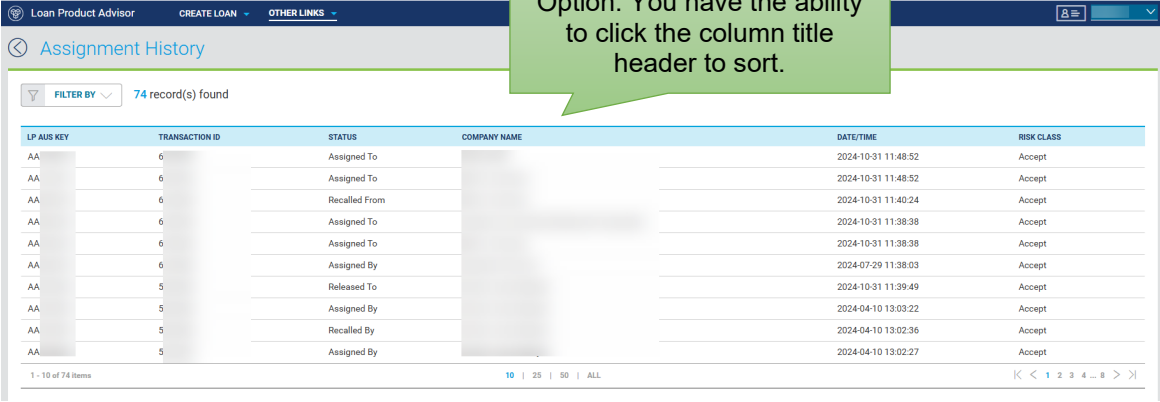
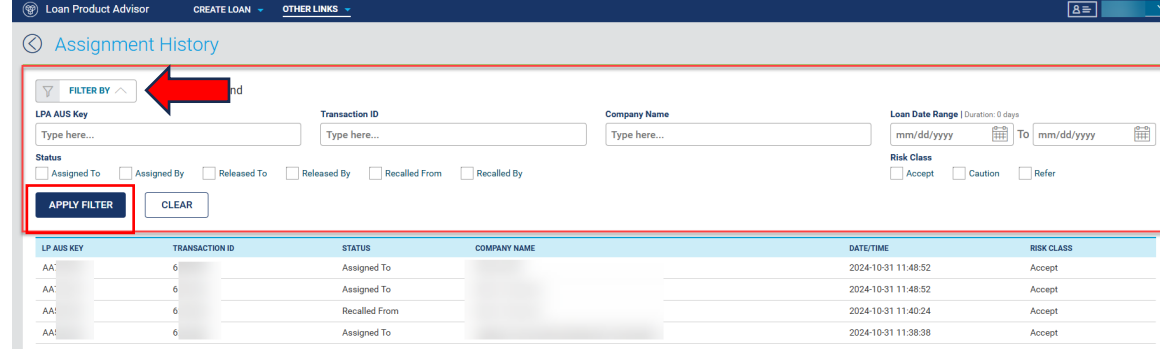
APPLY FILTER

CLEAR



Steps	Results
<div>9. To view an assignment history of a loan, select the loan and click the <b>Assignment History</b> icon in the right-side slider.</div> <div><ul style="list-style-type: none"><li>To view a list of all assignments, refer to Step 10 below.</li></ul></div>	<div>The assignment history of the loan displays.</div> <div></div> <div>The assignment history of the loan displays.</div> <div></div>



Steps	Results
10. To track assignments and releases access the <b>Assignment History</b> from <b>Other Links</b> (located on the <b>Loan Product Advisor</b> navigation bar).	<div><p>The <b>Assignment History</b> page displays a list of all assignments and releases for each loan. The entries in the assignment history are listed in chronological order, with the most recent loan file submission listed first.</p><p><b>Note:</b> When you click the <b>Filter By</b> option, you can add search criteria and <b>Apply Filter</b> to see updated results.</p></div>



## How to Recall a Loan

The Loan Assignment Recall feature allows an assignee lender to recall the assignment without the need for an assigned aggregator to "release" the transaction. Use the following steps to guide you through how to recall an assigned loan.

**Note:** If the assigned aggregator has opened/modified the loan for any reason, the assignee cannot recall the loan. The assigned aggregator must **release the loan back** to the party who assigned the loan.

Steps	Results																														
1. From the <b>Assignment Log</b> page select the <b>Assigned By Me</b> tab. Select the loan to recall the assignment, the right-side slider appears. Click the <b>Recall Loan</b> icon on the slider.	<div><div>Loan Product AdvisorCREATE LOANOTHER LINKS</div><div>Assignment Log</div><div>FILTER BY34 record(s) found</div><div>Assigned To MeAssigned By Me</div><div><table><thead><tr><th>COMPANY NAME</th><th>ASSIGNMENT DATE/TIME</th><th>LP KEY #</th><th>TRANSACTION ID</th><th>RISK CLASS</th><th>ASSIGNED MSP</th></tr></thead><tbody><tr><td></td><td>2024-10-31 11:48:52</td><td>AA</td><td>60</td><td>Accept</td><td>Nation</td></tr><tr><td></td><td>2024-10-31 11:24:09</td><td>AA</td><td>60</td><td>Accept</td><td>--</td></tr><tr><td></td><td>2024-08-02 19:00:00</td><td>AA</td><td>60</td><td>Accept</td><td>--</td></tr><tr><td></td><td>2024-08-01 13:57:42</td><td>AA</td><td>60</td><td>Accept</td><td>--</td></tr></tbody></table></div><div>Option: You have the ability to click the column title header to sort.</div><div>Recall Loan</div></div>	COMPANY NAME	ASSIGNMENT DATE/TIME	LP KEY #	TRANSACTION ID	RISK CLASS	ASSIGNED MSP		2024-10-31 11:48:52	AA	60	Accept	Nation		2024-10-31 11:24:09	AA	60	Accept	--		2024-08-02 19:00:00	AA	60	Accept	--		2024-08-01 13:57:42	AA	60	Accept	--
COMPANY NAME	ASSIGNMENT DATE/TIME	LP KEY #	TRANSACTION ID	RISK CLASS	ASSIGNED MSP																										
	2024-10-31 11:48:52	AA	60	Accept	Nation																										
	2024-10-31 11:24:09	AA	60	Accept	--																										
	2024-08-02 19:00:00	AA	60	Accept	--																										
	2024-08-01 13:57:42	AA	60	Accept	--																										
2. The <b>Recall Loan</b> page displays, select <b>Confirm Recall</b> .	<div><div>Recall LoanLP AUS KEY:AUS TRANSACTION #:</div><div>Loan Data</div><div><table><tr><td>BORROWER NAME</td><td>LOAN APPLICATION #</td><td>ORIGINATING COMPANY NAME</td><td>ASSESSED DATE &amp; TIME</td></tr><tr><td>Alice Freddie</td><td>CTE2LPA1</td><td>Cybertek Test 2</td><td>2023-02-17 10:37:31</td></tr></table></div><div>Select 'CONFIRM RECALL' to request the recall of the loan back to Cybertek Test 2.</div><div><div>CONFIRM RECALL</div><div>CANCEL</div></div></div>	BORROWER NAME	LOAN APPLICATION #	ORIGINATING COMPANY NAME	ASSESSED DATE & TIME	Alice Freddie	CTE2LPA1	Cybertek Test 2	2023-02-17 10:37:31																						
BORROWER NAME	LOAN APPLICATION #	ORIGINATING COMPANY NAME	ASSESSED DATE & TIME																												
Alice Freddie	CTE2LPA1	Cybertek Test 2	2023-02-17 10:37:31																												
3. Once you recall the loan a “Success” confirmation message appears	<div><div>Success</div><div>The following transaction was successfully recalled:</div><div><table><tr><td>LP AUS KEY #</td><td>TRANSACTION #</td><td>RECALL FROM</td></tr><tr><td></td><td></td><td></td></tr></table></div><div><div>RETURN TO HOMEPAGE</div><div>ASSIGNMENT LOG</div></div></div>	LP AUS KEY #	TRANSACTION #	RECALL FROM																											
LP AUS KEY #	TRANSACTION #	RECALL FROM																													

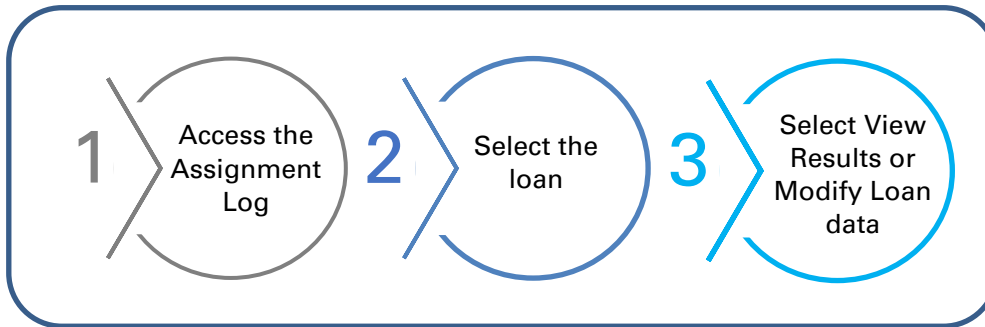




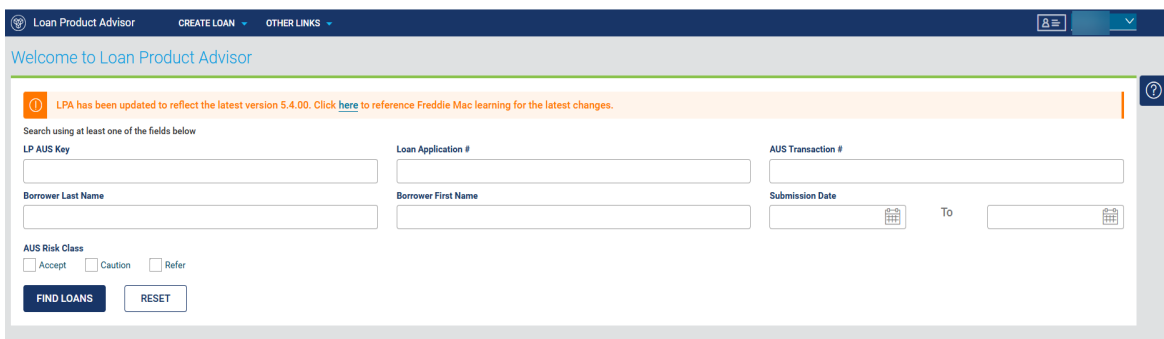
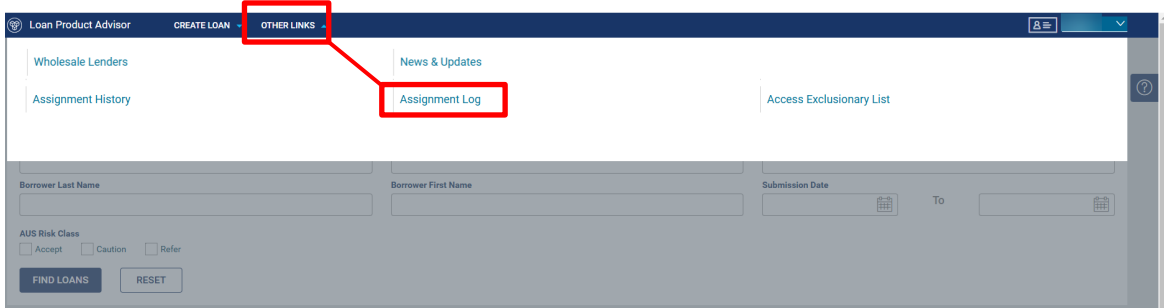
## How to Retrieve/View Assigned Loans

Once a loan is assigned, it can be viewed and modified by the assigned organization.

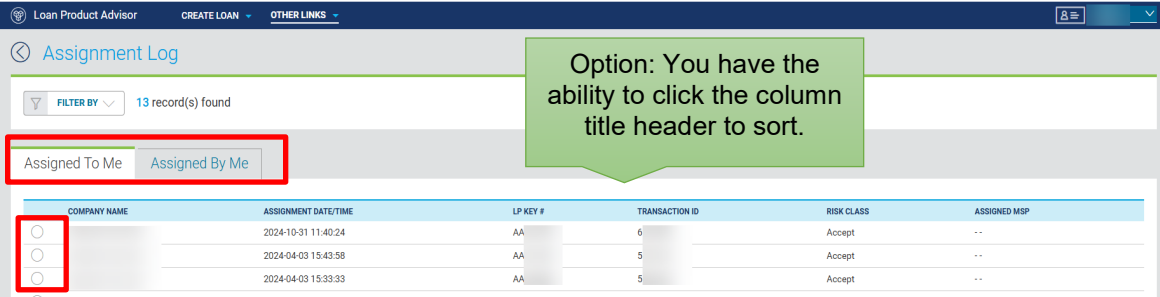
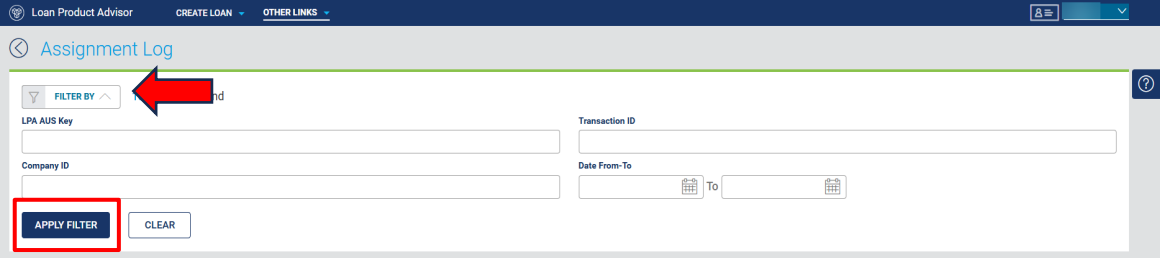
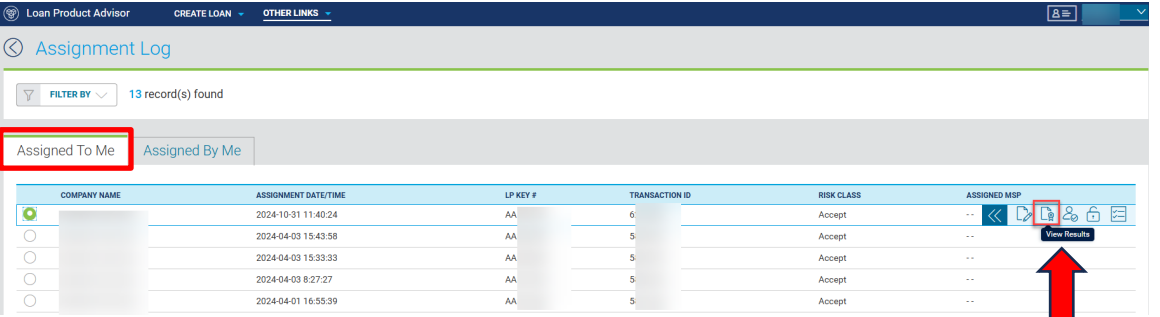
The following process flow provides a summary view of how to retrieve and view the assigned loan.



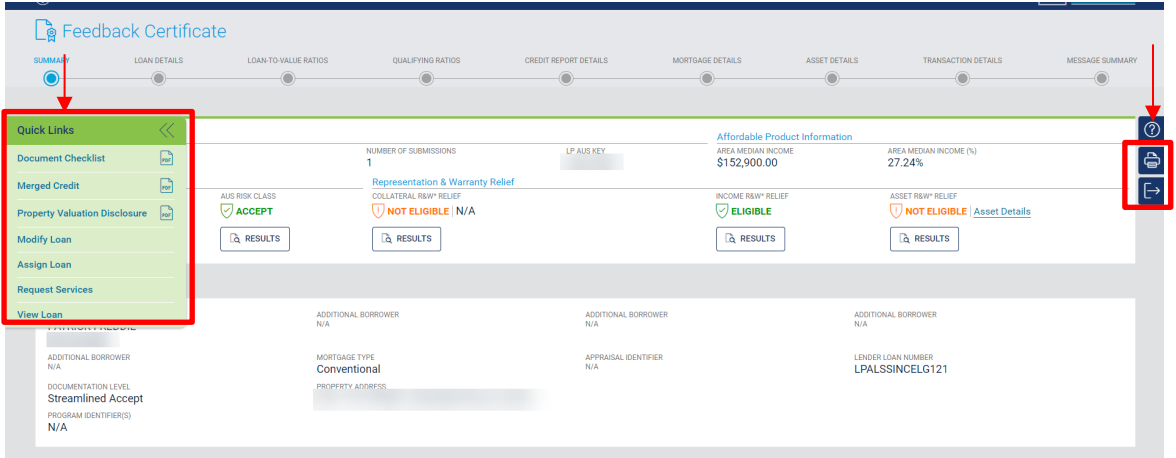
Use the following steps to guide you through how to retrieve and view assigned loans.

Steps	Results
1. After logging into Loan Product Advisor, the <b>Loan Product Advisor Welcome</b> page displays.	
2. Access the <b>Assignment Log</b> from the <b>Other Links</b> located on the <b>Loan Product Advisor</b> navigation bar.	



Steps	Results
3. <b>Assignment Log</b> page. Select the loan.	<p>The <b>Assignment Log</b> page displays the loans that have been assigned to you under the <b>Assigned To Me</b> tab and loans that have been assigned by you under the <b>Assigned By Me</b> tab. Select loan.</p>  <p><b>Note:</b> The entries in the <b>Assignment Log</b> are listed in chronological order, with the most recent loan file submission listed first. This view only lists the most recently assigned 500 loans to the lender/aggregator.</p> <p><b>Note:</b> When you click the <b>Filter By</b> option, you can add search criteria and <b>Apply Filter</b> to see updated results. The search will look at all loans that were assigned within the last six month period of time including those beyond the two most recently assigned.</p> 
4. Select the <b>View Results</b> icon from the right-side slider.	<p>Once you select your loan from the Assigned To Me tab, the slider will appear on the right side of the screen. Select the <b>View Results</b> icon to retrieve the Feedback Certificate for the selected loan.</p> 



Steps	Results
5. Review the Feedback Certificate.	<p>You have the option to select the <b>Print</b> icon to view and print the pdf, or select the <b>Export</b> icon to export the results.</p> <p>To view the Merged Credit Report or modify loan data, select the <b>Quick Links</b> slider to the left of the screen.</p>  <p><b>Note:</b> If you modify loan data and resubmit the transaction to Loan Product Advisor the wholesaler may be charged a secondary use fee by the Credit Reporting Company (CRC) for merged credit file requests.</p>



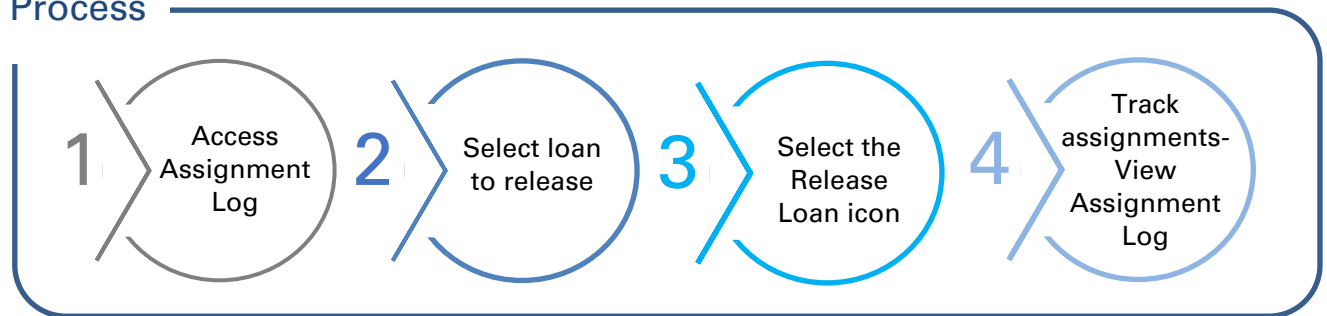
## How to Release a Loan

The Release Loan feature allows any party that has been assigned a loan the flexibility to **release the loan back** to the party who assigned the loan. When the loan is released, the party who assigned the loan **regains the ability** to modify loan data and resubmit and/or reassign the loan as needed. To reassign a loan refer to the “How to Assign a Loan” section.

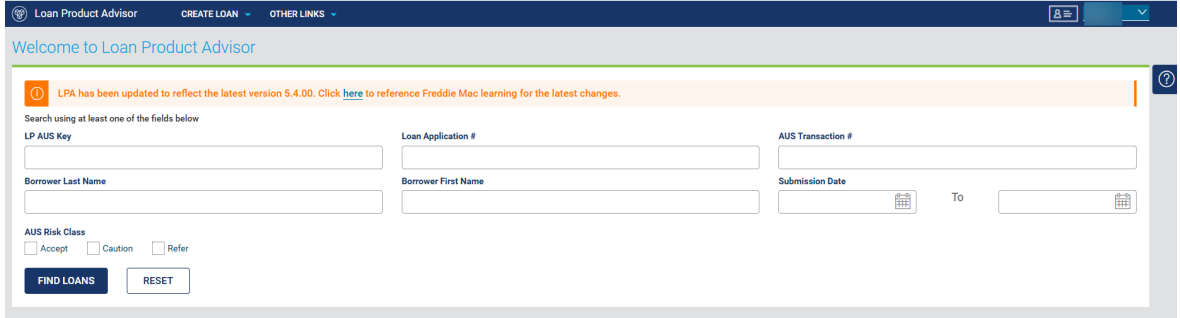
**Note:** To regain the ability to modify the loan data and/or reassign the loan the party who assigned the loan **must resubmit** the loan to Loan Product Advisor.

The following process flow provides a summary view of how to release a loan.

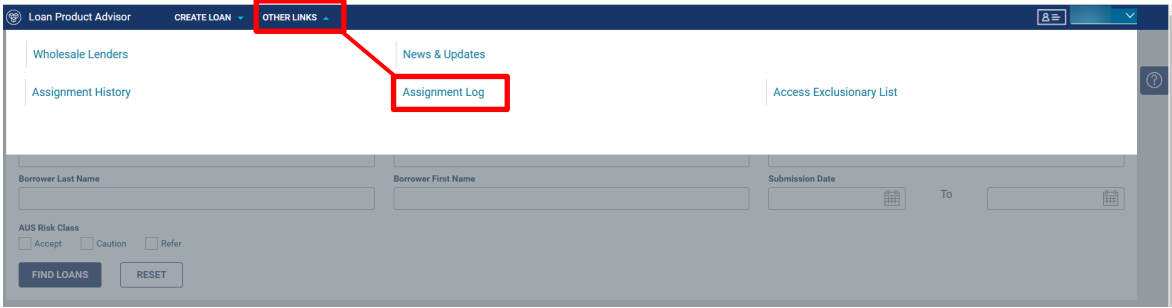
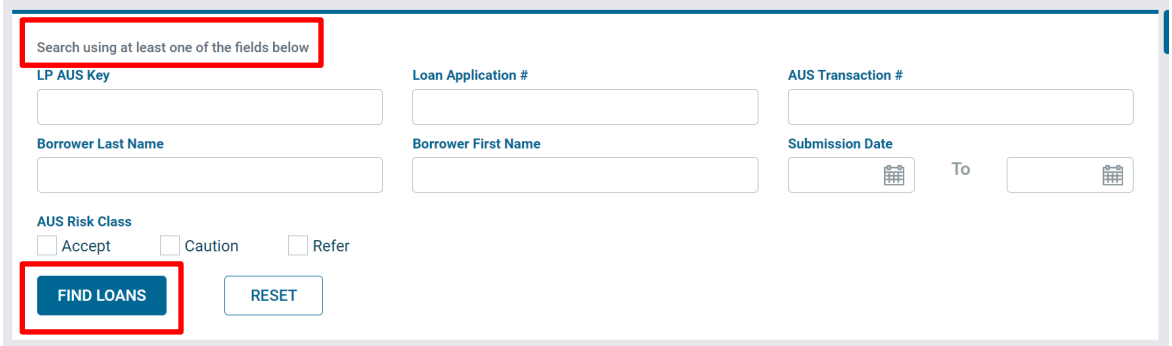
### Process



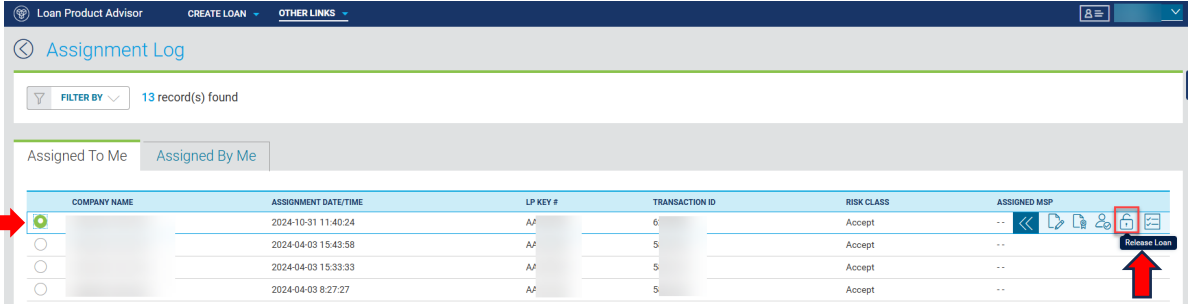
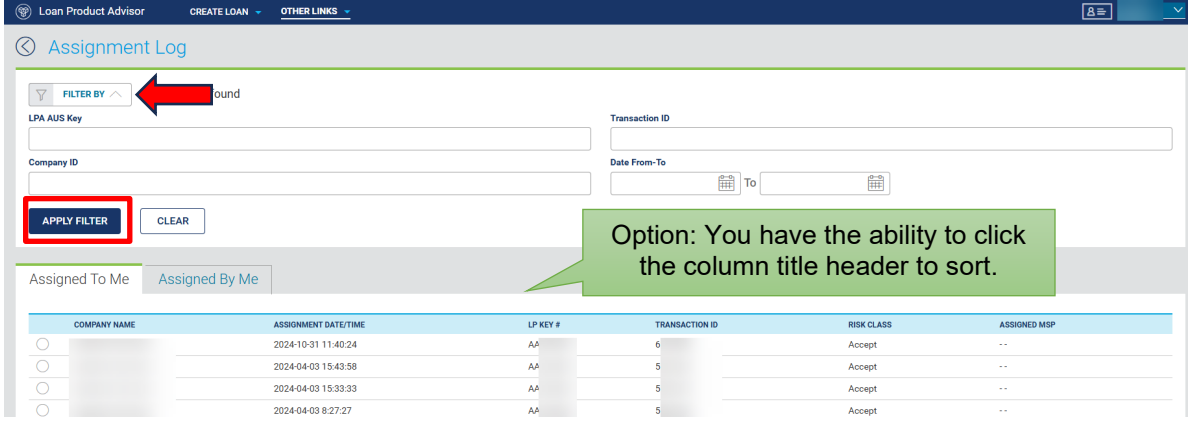
Use the following steps to guide you through how to release a loan.

Steps	Results
1. After logging into Loan Product Advisor, the <b>Loan Product Advisor Welcome</b> page displays.	

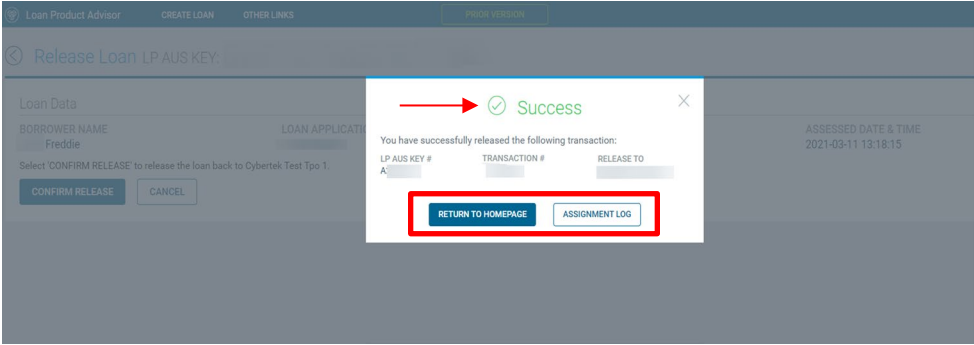
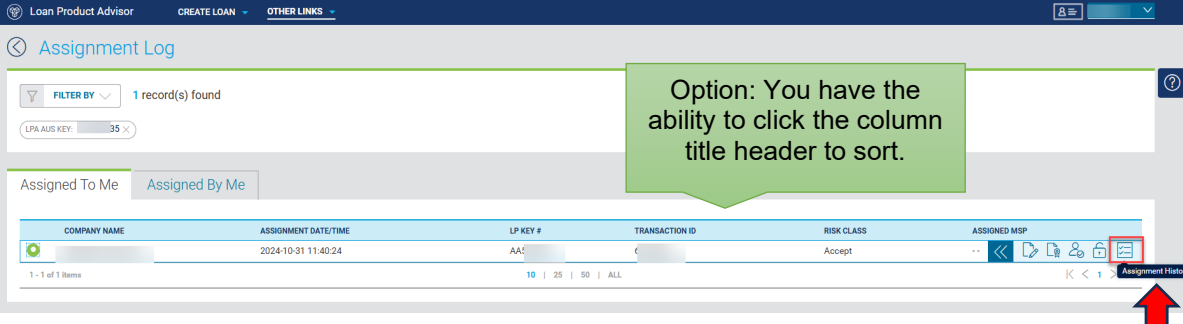
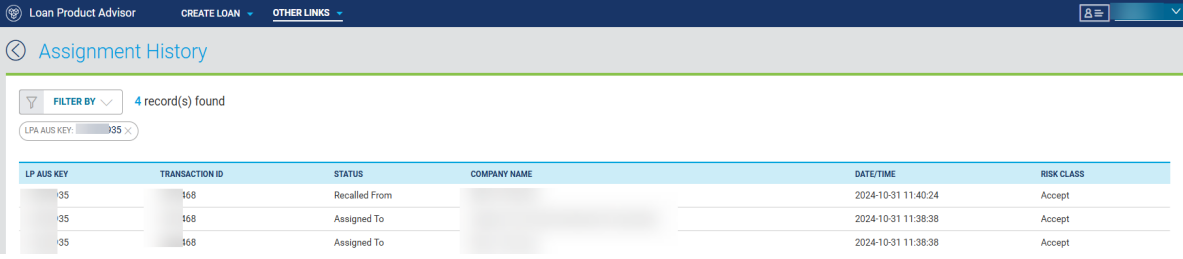


Steps	Results
2. Access the <b>Assignment Log</b> from the <b>Other Links</b> located on the <b>Loan Product</b> navigation bar.	<div></div> <p><b>Note:</b> You may also search for the loan by entering the appropriate search criteria to select the loan to be released. Select <b>Find Loans</b> to begin the search and select the loan from the search.</p> <div></div> <p><b>Note:</b> Any combination of upper- and lower-case letters are accepted. You must enter at least three characters for successful search results when using Borrower Last Name as a search criterion. Certain criteria must be used in pairs to successfully get search results.</p>



Steps	Results
3. On the <b>Assigned to Me</b> Tab, select the loan to be released. Click the <b>Release Loan</b> icon on the right-side slider.	<p>The <b>Assignment Log</b> page displays the loans that have been assigned to you under the <b>Assigned To Me</b> tab and loans that have been assigned by you under the <b>Assigned By Me</b> tab.</p>  <p><b>Note:</b> The entries in the <b>Assignment Log</b> are listed in chronological order, with the most recent loan file submission listed first. This view lists only the most recently assigned 500 loans to the lender/agggregator.</p> <p><b>Note:</b> When you click the <b>Filter By</b> option, you can add search criteria and <b>Apply Filter</b> to see updated results. The search will look at all loans that were assigned within the last six month period of time including those beyond the too most recently assigned.</p>  <p>Option: You have the ability to click the column title header to sort.</p>
4. The <b>Release Loan</b> page appears. Click <b>Confirm Release</b> .	



Steps	Results
5. Once you click <b>Confirm Release</b> , a <b>Success</b> confirmation appears that you have successfully released the transaction.	 <p>Two options display:</p> <ul style="list-style-type: none"><li>Return to the <b>Home Page</b>, or</li><li>Access the <b>Assignment Log</b> page to release another loan or view the status of a loan.</li></ul>
6. To view the assignment status of a loan.	<p>Select either:</p> <ul style="list-style-type: none"><li><b>Assignment Log</b>, then click the <b>Assigned By Me</b> or <b>Assigned To Me</b> tab to access the transaction history and scroll down to locate the loan, click the <b>Assignment History</b> from the right-side slider; or</li><li>Select the Filter By and enter your search criteria.</li></ul> <p><b>Note:</b> You also have the option to search for the loan from the LPA <b>Welcome</b> page and locate the transaction using the LP AUS Key Number.</p>  
<b>Reminder</b>	Once the loan has been released back to the party that assigned the loan the originating party must resubmit the loan to Loan Product Advisor to make any necessary changes and/or to reassign to another party.

This information is not a replacement or substitute for the requirements in the Freddie Mac *Single-Family Seller/Service Guide* or any other contractual agreements. This information does not constitute an agreement between Freddie Mac and any other party.

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