

Condo Project Advisor®

Release Notes | Updated January 14, 2023

Overview

The January 14, 2023 Condo Project Advisor® release includes the following enhancements to improve your experience:

- You have the ability to revisit the Project Assessment Results Summary page by clicking the PAR number within the My Workspace or the Project Assessment Results page, making it easier to find your data. This enables you to view the assessment messages for PAR records without a certificate.

The screenshot displays the Condo Project Advisor interface. The top navigation bar includes 'Condo Project Advisor™', 'PROJECT ASSESSMENT REQUEST', 'NEW WAIVER REQUEST', and 'OTHER LINKS'. Below this, the 'My Workspace' section features a 'PROJECT ASSESSMENT RESULTS' tab and a 'WAIVER REQUESTS' tab. A table titled 'My Recently Submitted Requests' lists several entries with columns for 'PROJECT NAME / PAR #', 'ADDRESS', 'SUBMITTED BY / DATE', 'SELLER NAME / SELLER #', 'SELLER LOAN #', 'LOAN PRODUCT ADVISOR KEY', 'STATUS', and 'FEEDBACK CERTIFICATE'. A green arrow points to the PAR number 'PAR100001161' in the first row. The 'Project Assessment Results' section below shows a summary of records from the most recent 31 days, with a 'FILTER BY' dropdown and a submission date range of '11/19/2022 - 12/19/2022'. A summary table shows: TOTAL 60, GREEN 30, YELLOW 9, and INCOMPLETE 21. Below this is another table with columns similar to the one above, showing records with statuses like 'GREEN' and 'INCOMPLETE'. A green arrow points to the PAR number 'PAR100001161' in the first row of this table.

- You can now export the Project Assessment Request (PAR) results from the Project Assessment Results page, so you can download records for your review.

Condo Project Advisor™ PROJECT ASSESSMENT REQUEST NEW WAIVER REQUEST OTHER LINKS

Project Assessment Results

Records displayed are from the most recent 31 days unless other applicable filters are selected.

FILTER BY

SUBMISSION DATE 11/19/2022 - 12/19/2022

| TOTAL | GREEN | YELLOW | INCOMPLETE |
|-------|-------|--------|------------|
| 60 | 30 | 9 | 21 |

| PROJECT NAME / PAR # | ADDRESS | SUBMITTED BY / DATE | SELLER NAME / SELLER # | SELLER LOAN # | LOAN PRODUCT ADVISOR KEY | STATUS | FEEDBACK CERTIFICATE |
|----------------------|---------|---------------------|------------------------|---------------|--------------------------|------------|----------------------|
| PAR100001163 | | | | | | GREEN | |
| PAR100001162 | | | | | | GREEN | |
| PAR100001161 | | | | | | INCOMPLETE | |

- There is now an enhanced Project Assessment Results “Filter By” criteria option, where you can filter by PAR records with or without a generated Condo Project Advisor Feedback Certificate. This will provide you with the ability to focus on submissions for loan delivery and maintaining mortgage loan files.

Condo Project Advisor™ PROJECT ASSESSMENT REQUEST NEW WAIVER REQUEST OTHER LINKS

Project Assessment Results

Records displayed are from the most recent 31 days unless other applicable filters are selected.

FILTER BY

Project Name:

PAR #:

Loan Product Advisor Key:

Seller Name: Hawthorn Bank

Seller Servicer #: 600602

Seller Loan #:

Street Name:

City:

State: Select state... Zip:

Date Range (Maximum 31 day range when applicable filters are applied): 11/19/2022 To 12/19/2022

Feedback Certificate: Yes No

APPLY FILTER CLEAR

| TOTAL | GREEN | YELLOW | INCOMPLETE |
|-------|-------|--------|------------|
| 60 | 30 | 9 | 21 |

| PROJECT NAME / PAR # | ADDRESS | SUBMITTED BY / DATE | SELLER NAME / SELLER # | SELLER LOAN # | LOAN PRODUCT ADVISOR | STATUS | FEEDBACK CERTIFICATE |
|----------------------|---------|---------------------|------------------------|---------------|----------------------|------------|----------------------|
| PAR100001161 | | | | | | INCOMPLETE | |
| PAR100001160 | | | | | | INCOMPLETE | |
| | | | | | | YELLOW | |

- You can now copy/paste to various open text fields so you can save time by typing less.
- Rearranged table fields improve organization for you within the Project Assessment table on the My Workspace and Project Assessment Results page.

Condo Project Advisor™ PROJECT ASSESSMENT REQUEST NEW WAIVER REQUEST OTHER LINKS

My Workspace

PROJECT ASSESSMENT RESULTS WAIVER REQUESTS

My Recently Submitted Requests Project Assessment Request

| PROJECT NAME / PAR # | ADDRESS | SUBMITTED BY / DATE | SELLER NAME / SELLER # | SELLER LOAN # | LOAN PRODUCT ADVISOR KEY | STATUS | FEEDBACK CERTIFICATE |
|----------------------|---------|---------------------|------------------------|---------------|--------------------------|------------|----------------------|
| PAR100001161 | | | | | | INCOMPLETE | |
| PAR100001160 | | | | | | INCOMPLETE | |
| | | | | | | YELLOW | |



Condo Project Advisor™ PROJECT ASSESSMENT REQUEST NEW WAIVER REQUEST OTHER LINKS Enter PASSWORD

Project Assessment Results

Records displayed are from the most recent 31 days unless other applicable filters are selected.

FILTER BY

SUBMISSION DATE 11/19/2022 - 12/19/2022

| TOTAL | GREEN | YELLOW | INCOMPLETE |
|-------|-------|--------|------------|
| 60 | 30 | 9 | 21 |

| PROJECT NAME / PAR # | ADDRESS | SUBMITTED BY / DATE | SELLER NAME / SELLER # | SELLER LOAN # | LOAN PRODUCT ADVISOR KEY | STATUS | FEEDBACK CERTIFICATE |
|----------------------|---------|---------------------|------------------------|---------------|--------------------------|------------|----------------------|
| PAR100001163 | | | | | | GREEN | |
| PAR100001162 | | | | | | GREEN | |
| PAR100001161 | | | | | | INCOMPLETE | |

- You now have updated My Preferences options to include: Homepage, New Waiver Request, and Project Assessment Request.

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My Preferences

Profile

Navigation

Notification

Stay Connected

Landing Page Preferences

Please select your preferred tool to display upon login:

- Condo Project Advisor™
- New Waiver Request
- Project Assessment Request
- Quality Control Advisor™

Please select your preferred landing page for each tool:

| Tool | Preferred Landing Page |
|------------------------|---|
| Condo Project Advisor™ | <input checked="" type="radio"/> Homepage <input type="radio"/> New Waiver Request <input type="radio"/> Project Assessment Request |

FEEDBACK

