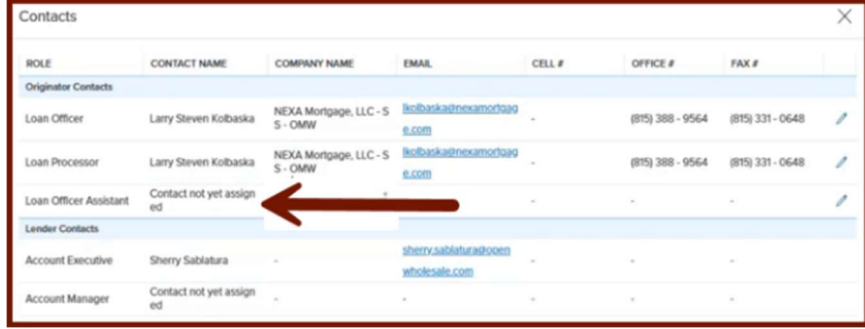
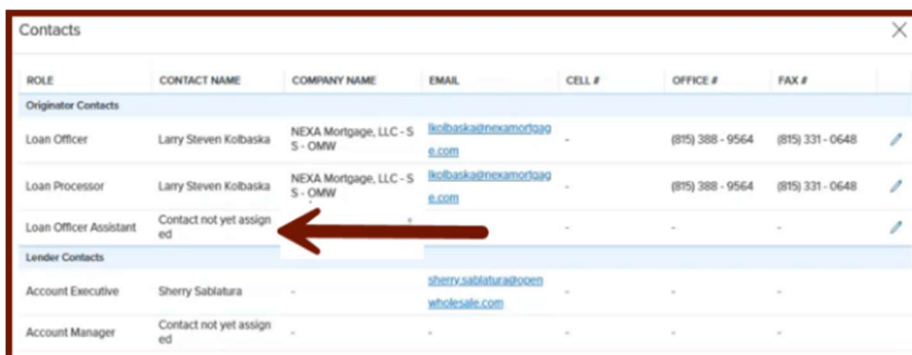


ARENA PORTAL: ADDING AN LOA TO THE LOAN FILE

Purpose: This job aid explains how to add a Loan Officer Assistant (LOA) to a loan file in Arena Portal. It also outlines why an LOA may not appear in the selection list and the required steps to resolve access issues through Client Management.

DESCRIPTION	STEP / ACTION
ACCESS THE LOAN FILE	<ol style="list-style-type: none"> 1. Open the loan file in Arena Portal. 2. Locate the contact/person icon used to assign loan participants (Loan Officer, Processor, LOA). 
ADD THE LOA TO THE LOAN	<ol style="list-style-type: none"> 1. Click the person/contact icon. 2. Open the LOA (Loan Officer Assistant) selection field. 3. Select the LOA from the dropdown list and save your changes. 
IF THE LOAN IS NOT IN THE DROP DOWN	<p>If the LOA Is NOT in Dropdown selection list:</p> <ol style="list-style-type: none"> 1. Confirm whether the user has been assigned the Loan Officer Assistant (LOA) role. <ul style="list-style-type: none"> • Users will only appear in the dropdown if they have the correct role assigned. 2. If the LOA is missing, request support through: <ul style="list-style-type: none"> • Account Executive (AE), or • Partner Success 3. The request must be submitted to Client Management to: <ul style="list-style-type: none"> • Assign the LOA role, and • Ensure the user has the correct permissions to appear in the loan file



ROLE	CONTACT NAME	COMPANY NAME	EMAIL	CELL #	OFFICE #	FAX #
Originator Contacts						
Loan Officer	Larry Steven Kolbaska	NEXA Mortgage, LLC - S S - OMW	kolbaskatnexamortgage@nexus.com	-	(815) 388 - 9564	(815) 331 - 0648
Loan Processor	Larry Steven Kolbaska	NEXA Mortgage, LLC - S S - OMW	kolbaskatnexamortgage@nexus.com	-	(815) 388 - 9564	(815) 331 - 0648
Loan Officer Assistant	Contact not yet assigned	-	-	-	-	-
Lender Contacts						
Account Executive	Sherry Sablatara	-	sherry.sablatara@boomwholesale.com	-	-	-
Account Manager	Contact not yet assigned	-	-	-	-	-

Important: Brokers should **not** contact Client Management directly. Requests should go through AE or Partner Success.

UNDERSTAND ROLE REQUIREMENTS

1. Ensure users have the correct roles assigned in Client Management:
 - Loan Officers may require dual roles (e.g., Loan Officer + Processor).
 - LOAs must have the Loan Officer Assistant role assigned.
2. Without the correct role setup:
 - The user will not appear in the dropdown
 - The user cannot be added to the file as a third contact

BEST PRACTICES

1. If the loan has already been **approved by underwriting**, navigate to the **Conditions** tab instead of relying only on resubmission.
2. Upload and manage documents based on **conditions requested by underwriting**.