



SBL UPDATE

Small Balance Loans (SBL) Holiday Calendar

Happy New Year! We've published a [2022 SBL Holiday Calendar](#) on the [Originate & Underwrite webpage](#). Please note that those days are not considered to be business days when calculating due dates.

Reminder: Partial B2B Submissions & Inspection Scheduling

This is a reminder to ensure that all the required information is in the Document Management System (DMS) at the time the inspection request is submitted. By doing so, you'll greatly increase Freddie Mac's ability to confirm the requested inspection date and time.

Please be aware of the process below and the required lead time.

1. Once a loan is under application, the Optigo® lender must submit a partial B2B upload shortly thereafter to create a loan number, which will trigger certain downstream system events that are necessary for the Optigo lender to complete their underwriting process.
2. A successful upload of the partial B2B will trigger the creation of a folder in DMS for the loan and creation of an inspection form in Optigo Happy. Please allow **at least two business days** for the loan information to populate and trigger these downstream processes.

3. Upload the rent roll and borrower questionnaire to the DMS folder.
4. Submit an inspection schedule request and, if required, an Optigo Happy virtual order form.

Please **do not** submit a request to schedule an inspection until the required information is in DMS and the inspection is confirmed in Optigo Happy. If the inspection is not in Optigo Happy, please contact the [Optigo Happy service desk](#).

A full and complete B2B upload is required at loan submission upon the lender's completion of their underwriting. That initial loan number is used throughout the process. The information in the complete B2B upload will replace any outdated or draft information that was included in any preceding, partial B2B upload. If you have issues with your B2B upload, contact the [Multifamily Service Desk](#).

Welcome Alex Meersman to the West!

We are pleased to announce that Alex has officially joined the Western region production team as of Monday, January 3. Many of you are already familiar working with Alex in the South Central region. Now that we have welcomed Skyler Mohr as a producer for the South Central region, we are excited to bring Alex's expertise to the Western region! As always, please be sure to include [SBL West](#) on any prescreens, exceptions and pricing discount requests.

Below is the primary producer for each SBL lender in the Western region:

Ted Chen

- Arbor
- Capital One
- Lument
- Pinnacle
- Sabal

Alex Meersman

- Basis
- Berkadia
- CBRE
- CPC
- Greystone

- Walker & Dunlop

- Ready Capital

[Ted Chen](#) can be reached directly at 213-337-4238. [Alex Meersman](#) can be reached directly at 312-407-7444.

Small Talk

Each week we welcome any questions from you in the Small Talk series. Please continue to submit questions to the [Small Talk mailbox](#) to hear from a select member of our team in the following week's *SBL Update*.

This week we're featuring [Skyler Mohr](#). Skyler is a producer in the South Central region.



[Skyler at Lambeau Field on Christmas day.](#)

What word best describes your 2021?

Reshuffle. 2021 brought some fantastic new opportunities for me. I moved from Birmingham, Alabama to Dallas right at the beginning of 2021. I then joined Freddie Mac in November of 2021. Both exciting changes have paved the groundwork for a bright and exciting 2022 and beyond.

How do I make sure my property is in Optigo Happy for my inspection?

Funny enough, we just addressed this above! The partial B2B upload into OUS should be completed shortly after going under application, and at a minimum, two business days in advance of the scheduled inspection. Failure to do so may result in delays in inspecting the property. As a reminder, the loan number created with the initial partial upload is the loan number used throughout the entire process. There is no need to get a new loan number.

How did you spend your holiday season?

My father and I attended our first Green Bay Packers game at Lambeau Field, which was on Christmas Day. It was incredible to experience the aura and history of Lambeau Field, and of course the Packers secured the victory for us!



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