



## Lending | Pending Loans



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## Overview

**Pending Loans** displays list of outstanding loan applications and documents. Pending Loans is only available to the credit unions that use the Loan Application or Documents optional software packages.



### Important

Teller security determines access to display, add, edit, or remove loans from the Pending Loan List.

The Pending loan list will NOT display loan applications or documents when the status falls in the categories below:

#### Loan Application

- Approved AND Built (Application stored, and Loan Document created)
- Member Cancelled
- Denied
- Deleted (Application deleted from system)

#### Loan Documents

- Loan is Disbursed
- Deleted



### Note

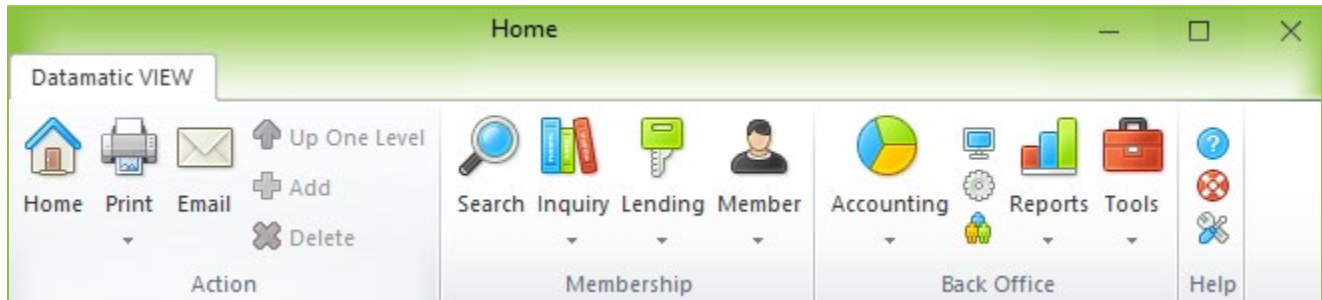
Loan Document records purge with End of Day Process if the issue date is greater than 60 days.

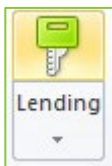
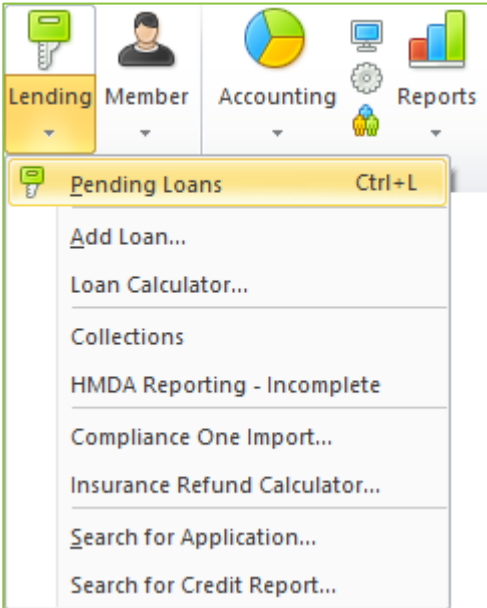
## Navigation

Pending Loans can be display as follows:








### **Main Ribbon (Ctrl + L)**

- Main Ribbon > Lending
- Main Ribbon > Lending > Pending Loans



	<p>Split Menu Button (top)</p>
	<p>Split Menu Button (bottom)</p>










**Member Ribbon > Folders**

Folders	
+ Add ▾	
DESCRIPTION	COMMENT
 Cross References	
 Document Images	
 Internet Banking	
 Member Information	
 Names	
 Pending Loans	
 Statements	



## List

Below are examples of the Pending Loans Lists:

Main Pending Loans:

Pending Loans		
NAME	ACCOUNT	STATUS
 Smith, Sam	546-99-8888	Application - Approved
 Winner, Lottery	2323-4	Application - Counter Offer
 Driver, Amy	12623-5	Application - In Progress
 Winner, Lottery	2323-4	Application - Internet Banking
 (Non Member)	547-88-9999	Application - Pending Review
 Focal Point Photography	12369-5-10	Document - Add-On
 Zane, Member	247805-5-05	Document - Needs Disbursing
 Lester, Jon	12355-4-24	Document - New
 Lester, Jon	12355-4-28	Document - Refinance

Member Pending Loans:

Pending Loans					
<a href="#">↑ Up One Level</a> <a href="#">+ Add</a> <a href="#">✕ Remove</a>					
ACCOUNT	TYPE	STATUS	DATE	AMOUNT	OFFICER
 12623-5-06	Document	New	02-20-2020	\$88,475.00	025
 12623-5-00	Application	In Progress	05-30-2019	\$65,000.00	025

Column	Comments	
<b>Name</b>	Applicant Name	
<b>Account</b>	Applicant Member Number or Social Security Number; Full Account for Loan Document	
<b>Status</b>	<b>Application Status Types</b>	
	<b>Approved</b>	<b>Internet Banking</b>
	<b>Counter Offer</b>	<b>Pending Review</b>
	<b>In Progress</b>	
	<b>Document Status Types</b>	
<b>Add-on</b>	<b>New</b>	
<b>Needs Disbursing</b>	<b>Refinance</b>	
<b>Date</b>	Application Date	
<b>Amount</b>	Amount Requested	
<b>Officer</b>	Loan Officer	




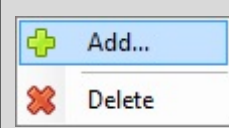

### User Tip

To apply a temporary sort, double click on the column headings. Permanent sort options are available in the [\[Main Ribbon > Tools > Option > Lending Tab\]](#).

### Add

The Loan Wizard [[Main Ribbon > Lending > Add Loan](#)] will add items to the Pending Loan List.

The Add Loan Wizard can be launched by:

Click	Right Click	Shortcut Key
		

### Edit

To modify a Loan Applications and Documents use one of the following:

Double Click	Right Click	Shortcut Key
<b>Item</b>	<b>None</b>	

### Delete

To remove a Loan Applications and Documents use one of the following:

Click	Right Click	Shortcut Key
