



Operating instructions

Introducing the most popular renovation report writing software for 203k Consultants with lender and underwriters preferred by an overwhelming 98%.

Upgrades over the v10 include the following:

- Bid specs now have a larger box where you can see the entire paragraph at one time
- Enhanced search capabilities for lenders, contractors, inspectors, etc. Start typing their name
- New field for draw administrator
- Draw administrator now listed also on the opening page
- Minor bugs fixed
- Enhanced feasibility analysis to add one or more “recommended contractors”
- Most of your signing now is done when you save the project

Let's get started... an order comes in and you open the software to add a new project



203k [BETA] (C:\Users\Owner\Dropbox\MY Folder\MY 203k 2012.203k.203k)

Buttons: Add New..., Export..., Delete, About..., Change Database, Options..., Refresh

Search

File No	Borrower's Name	Lender	Property Address	City	State	Loan Agent	Consultant
JV032612-1 *	Francine Hills	Bank of America (San Jose)	30509 Preetwick Avenue	Hayward	California (CA)	Gitoy, Rob	The Mike Young Tea...
L107142	David B. Will & Jeannie R. Vranes	Wells Fargo Home Mortgage (Roseville)	16891 Peimeter Road	Grass Valley	California (CA)	Warren, Jacob	The Mike Young Tea...
M009132 *	Thomas B. Gruening	O.A. Mortgage Services / Garry Bettencourt (Richmond)	4037 Lambert Road	El Sobrante	California (CA)	Bettencourt, Garry	203kOnLine.com
M010201	Joan Jenkins	Wells Fargo Home Mortgage (Folsom)	788 & 794 Chamberlain Street	Placerville	California (CA)	Anderson, Sean	203kOnLine.com
M012012	Casey Boespflug	Wells Fargo Home Mortgage (Minneapolis)	240 Mt. Shasta Circle	Aturas	California (CA)	Paulson, Todd	203kOnLine.com
M101196	Michael & Meehyn Kurtzman	Wells Fargo Home Mortgage (San Rafael)	125 Mt. Lassen Drive	San Rafael	California (CA)	Loberg, Greg	The Mike Young Tea...
M103056	Fares Amnan	Bank of America (San Mateo)	404 Cavanaugh Street	San Mateo	California (CA)	Chang, Soo	The Mike Young Tea...
M103211	Gayle Smith	Wells Fargo Home Mortgage (Encinitas)	3057 58th Street	Sacramento	California (CA)	Fitzpatrick, Danny	The Mike Young Tea...
M104052	Maulik Shah and Renu Madan	Wells Fargo Home Mortgage (Palo Alto)	427 Clifton Street	Oakland	California (CA)	Black, James	The Mike Young Tea...
M104061	Dru & Tom Boyd	Bank of America (Danville)	2051 W. Avenue 133rd	San Leandro	California (CA)	Black, James	The Mike Young Tea...
M104151	Martosh DeLeon	Mason McDuffie Mortgage Corp. (Pleasanton)	902 & 904 Maine Street	Vallejo	California (CA)	Moore, Allen K.	The Mike Young Tea...
M104193	MIGUEL A MORALES & AIDA CHAVEZ	Bank of America (Campbell)	1579 Whittton Avenue	San Jose	California (CA)	Nguyen, Stephanie K.	The Mike Young Tea...
M105033	Penelope Gilman	Wells Fargo Home Mortgage (Roseville-1)	23718 Maple Court	Auburn	California (CA)	McLaughlin, Sheri	The Mike Young Tea...
M105094	Jason & Shannon Banks	Bank of America (Danville)	75 Park Circle	Sausalito (Marin City)	California (CA)	Black, James	The Mike Young Tea...
M105231	Richard Clark	American Pacific Mortgage (West Sacramento)	1010 78th Avenue	Oakland	California (CA)	Lackey, Lori	The Mike Young Tea...
M105237	Karl & Tawny Amds	Wells Fargo Home Mortgage (Stockton)	19201 Ridgeway Hwy	Potter Valley	California (CA)	Nordberg, Howard	The Mike Young Tea...
M106081	Shane & Wendy Quivey	Wells Fargo Home Mortgage (San Rafael)	105 Howard Avenue	Burlingame	California (CA)	Loberg, Greg	The Mike Young Tea...
M108091 *	Robinson - Wyrsch	Opes Advisors Mortgage Services (Palo Alto)	1209 James Way	Petaluma	California (CA)	Arrowood, Gayle	The Mike Young Tea...
M108171	Siddharth Kyawat & Supriya Pandit	Wells Fargo Home Mortgage (San Leandro)	79 Norwood Avenue	Kinsington	California (CA)	Malic, Jacqueline C.	The Mike Young Tea...
M108312	David LaBua & Josephine Prudhomme	Wells Fargo Home Mortgage (San Anselmo)	12 Valley Road	Fairfax	California (CA)	Loberg, Greg	The Mike Young Tea...
M109211	Lesley Leposo	Wells Fargo Home Mortgage (Walnut Creek)	5834 Occidental Street	Oakland	California (CA)	Floyd, Tim	The Mike Young Tea...
M110044	Alden Patrick & Tamara Whitted	Wells Fargo Home Mortgage (San Rafael)	16790 Watson Road	Guerneville	California (CA)	Loberg, Greg	The Mike Young Tea...
M110059	Elizabeth Lane	Bank of America (San Mateo)	712 Hudson Street	Rohnert Park	California (CA)	Chang, Soo	The Mike Young Tea...
M110071	Kyle & Zuzanna LeBeouf	Wells Fargo Home Mortgage (Walnut Creek)	95 Coleridge Street	San Francisco	California (CA)	Rogers, Edward	The Mike Young Tea...
M112051 *	Daniel R White & Claudia Gonzalez	Wells Fargo Home Mortgage (Minneapolis)	318 Paloma Avenue	San Rafael	California (CA)	Chesla, Jacob	The Mike Young Tea...
M112203	Coelise Martin	Wells Fargo Home Mortgage (Elk Grove)	1480 Valenzuela Court	Pittsburg	California (CA)	Estes, Darren	The Mike Young Tea...
M201222	Ramon & Dolores Soltero	Wells Fargo Home Mortgage (Walnut Creek)	2733 Danville Blvd.	Alamo	California (CA)	Rogers, Edward	The Mike Young Tea...
M201223 *	Dr. Christopher Hall & Michael Buchanan	Bank of America (San Jose)	4560 Mt Taylor Drive	Santa Rosa	California (CA)	Gitoy, Rob	The Mike Young Tea...
M201246 *	Jeffrey & Ashley Williams	Prospect Mortgage (San Mateo)	2380 El Camino Drive	Turlock	California (CA)	Caulfield, Phil	The Mike Young Tea...
M201248 *	Manissa M. Huang	Bank of America (San Jose)	228 First Street	Napa	California (CA)	Gitoy, Rob	The Mike Young Tea...
M204093	Aaron Iverson	Wells Fargo Home Mortgage (Minneapolis)	2300 Melvin Road	Oakland	California (CA)	Skudarek, Nicholas	The Mike Young Tea...
M205311	Andrew Sutherland & Julia Ersan	W. J. Bradley (Burlingame)	3120 Rocks Avenue	Martinez	California (CA)	Chang, Soo	The Mike Young Tea...
O201249	Lyman Hollins & Barbara Lewis	Wells Fargo Home Mortgage (Walnut Creek)	2122 Ward Street	Berkeley	California (CA)	Rogers, Edward	The Mike Young Tea...

149 active files found, sorted by Borrower's Name (Ascending) Hide Inactive Files

Information Sheet - 203k [BETA]

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: _____ Lender: _____ Borrower: _____ Property: _____

General | Borrower | Subject Property* | Loan/Escrow | MMW* | Contractors | Fees* | Project Notes | Work Write-Up* | Configuration*

File Number: _____ FHA Case Number: _____

Order Date: Friday, March 15, 2013 COE Date: Friday, March 15, 2013

Purchase Price: _____ Improved Value: _____

Sell Price: _____ Investment: \$0.00

Completion Months: 0 Completion Date: 3/15/2013

Appointment: Friday, March 15, 2013 8:54 PM Appt. Weather: _____

Inspector: (None) [Details] [Add/Edit]

Company: (None) [Details] [Add/Edit]

File Status: Active

Information Sheet - 203k [BETA]

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

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Information Sheet - 203k [BETA]

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: _____
Lender: _____

Borrower: _____
Property: _____

General | Borrower | Subject Property | Loan/Escrow | MMW | Contractors | Fees | Project Notes | Work Write-Up | Configuration

File Number		FHA Case Number	
Order Date	<input checked="" type="checkbox"/> Friday, March 15, 2013	COE Date	<input type="checkbox"/> Friday, March 15, 2013
Purchase Price	\$275,000.00	Improved Value	
Sell Price	\$275,000.00	Investment	\$0.00
Completion Months	6	Completion Date	9/15/2013
Appointment	<input checked="" type="checkbox"/> Friday, March 15, 2013 8:54 PM	Appt. Weather	
Inspector	Young, Mark	Details	Add/Edit
Company	Young, Mike	Details	Add/Edit
File Status			

Information Sheet - 203k [BETA]

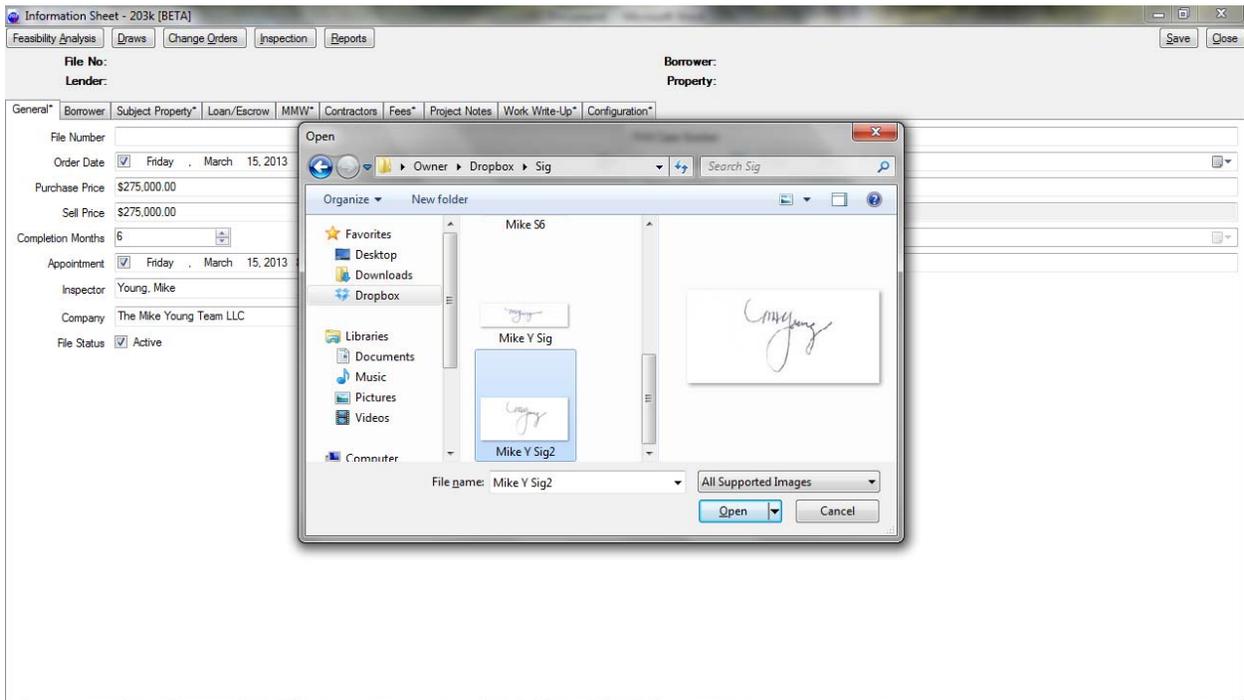
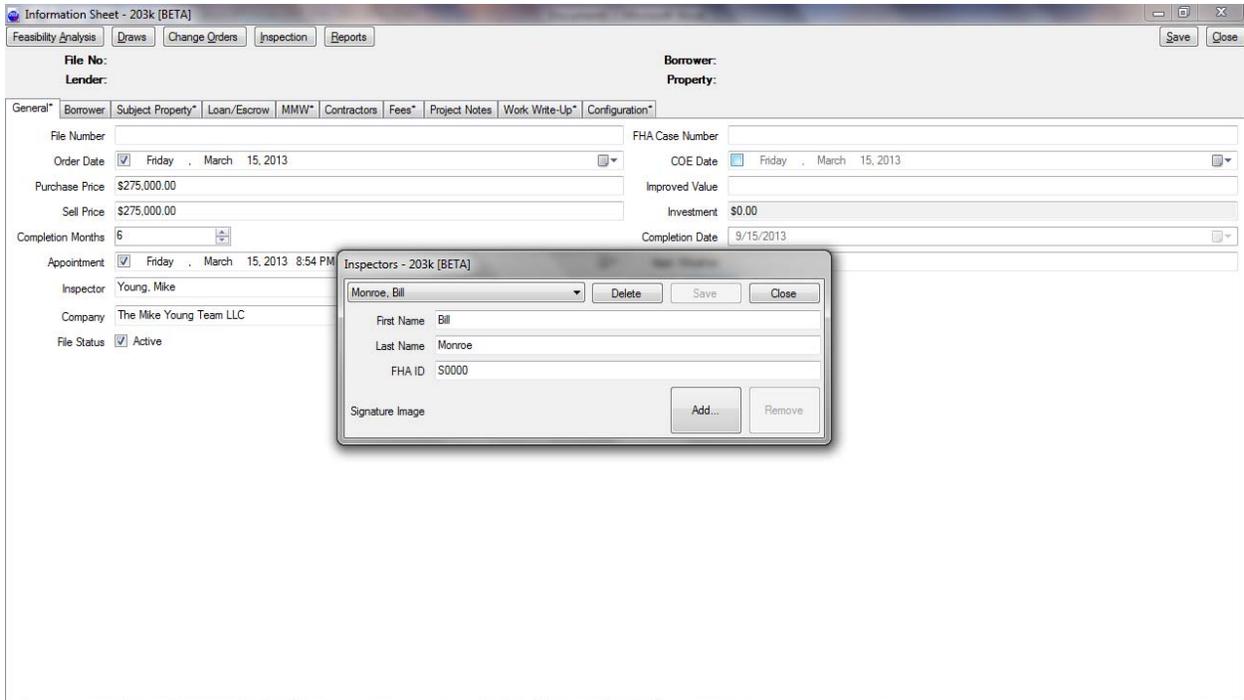
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Appointment	<input checked="" type="checkbox"/> Friday, March 15, 2013 8:54 PM	Appt. Weather	
Inspector	Young, Mike	Details	Add/Edit
Company	The Mike Young Team LLC	Details	Add/Edit
File Status	<input checked="" type="checkbox"/> Active		



Information Sheet - 203k [BETA] Save Close

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: **Borrower:**
Lender: **Property:**

General | Borrower | Subject Property* | Loan/Escrow | MMW* | Contractors | Fees* | Project Notes | Work Write-Up* | Configuration*

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Inspector	Young, Mike		
Company	The Mike Young Team LLC		
File Status	<input checked="" type="checkbox"/> Active		

Inspectors - 203k [BETA] Delete Save Close

Monroe, Bill

First Name: Bill
 Last Name: Monroe
 FHA ID: S0000

Signature Image:  Change... Remove

Information Sheet - 203k [BETA] Save Close

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: **Borrower:**
Lender: **Property:**

General | Borrower* | Subject Property* | Loan/Escrow | MMW* | Contractors | Fees* | Project Notes | Work Write-Up* | Configuration*

Borrower Name: Johnny Jones

Current Address:

City:

State: (None) ▼

ZIP:

Phone:

Alternate Phone:

[Email](#):

Information Sheet - 203k [BETA]

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: _____ Borrower: _____
 Lender: _____ Property: _____

General* | Borrower* | Subject Property* | Loan/Escrow | MMW* | Contractors | Fees* | Project Notes | Work Write-Up* | Configuration*

Address: 123 Any Street
 City: Panama City
 State: Florida (FL)
 ZIP: 23145
 County: Broward

Number of Units: 1
 Year Built/Age: 1983/30

[Use Borrower's Address](#)

Information Sheet - 203k [BETA]

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: _____ Borrower: _____
 Lender: _____ Property: _____

General* | Borrower* | Subject Property* | Loan/Escrow | MMW* | Contractors | Fees* | Project Notes | Work Write-Up* | Configuration*

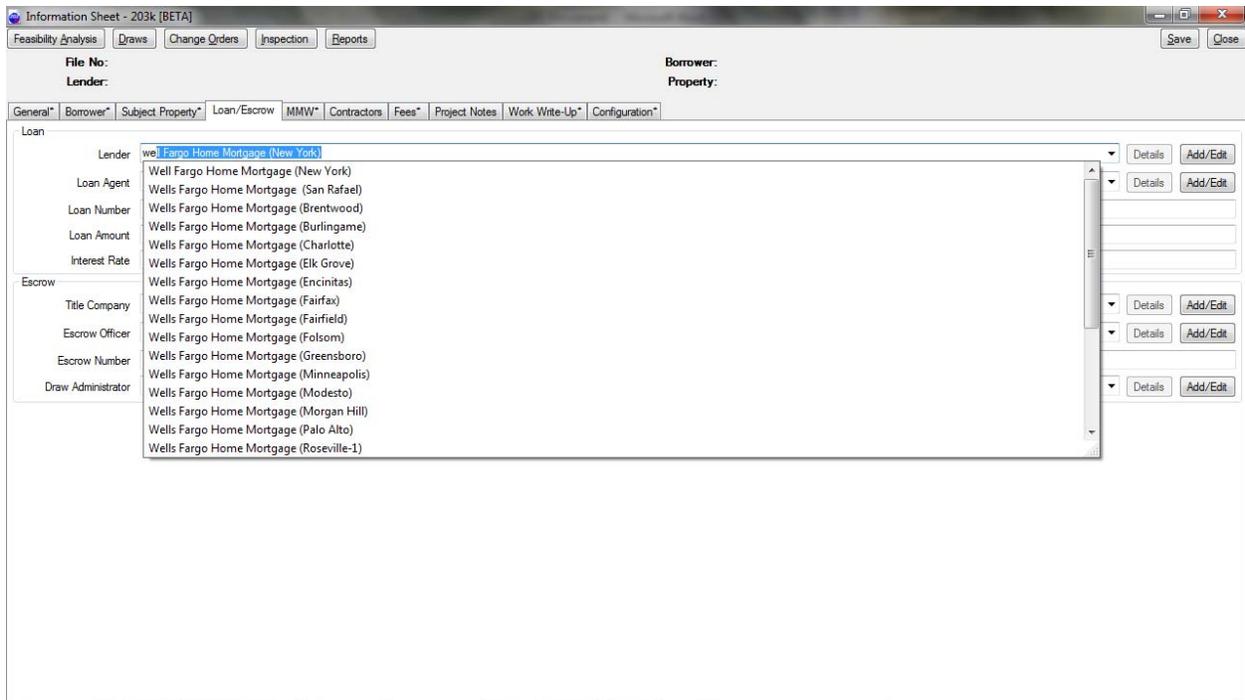
Loan

Lender: (None) [Details] [Add/Edit]
 Loan Agent: (None) [Details] [Add/Edit]
 Loan Number: _____
 Loan Amount: _____
 Interest Rate: _____

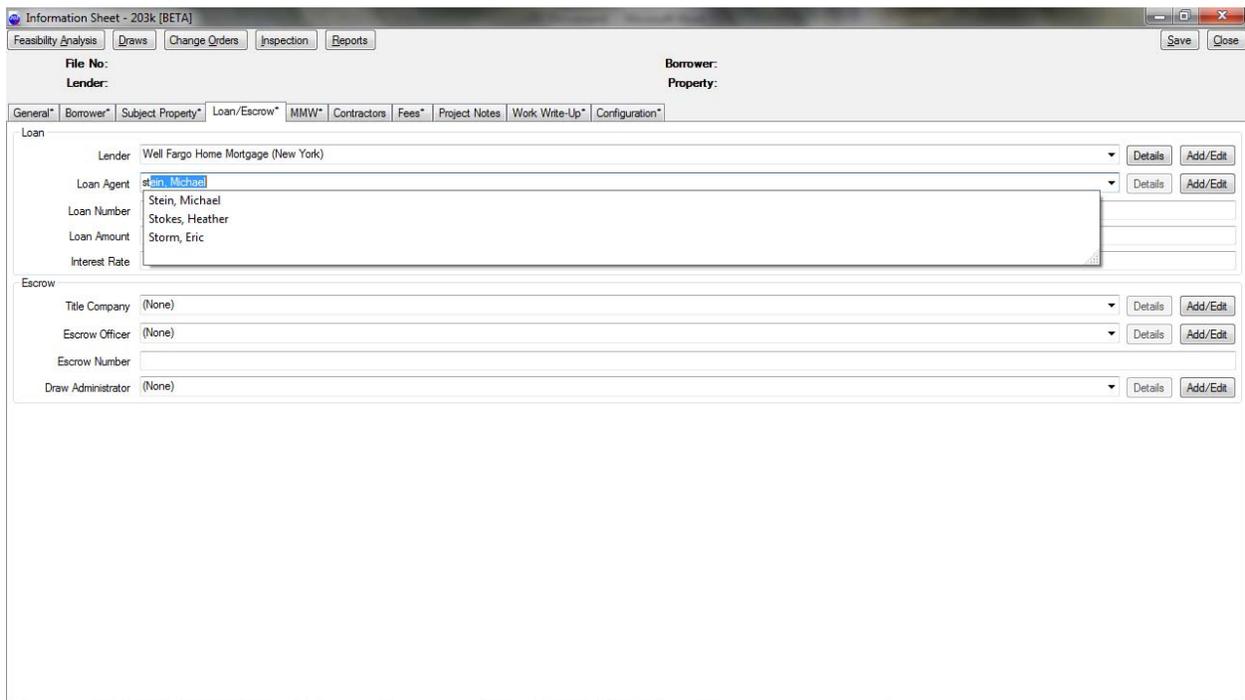
Escrow

Title Company: (None) [Details] [Add/Edit]
 Escrow Officer: (None) [Details] [Add/Edit]
 Escrow Number: _____
 Draw Administrator: (None) [Details] [Add/Edit]

Start typing the name...



Once you start typing you can see the results and can then choose the one you are looking for.



Start typing the last name of your loan agent, once the choices show up, scroll down to choose the one you want.

Title company is only needed if you are planning to bill escrow for your fees... I don't recommend that. The draw administrator won't be added until the loan closes & they reveal themselves.

pi

Information Sheet - 203k [BETA]

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: _____ Borrower: _____
Lender: _____ Property: _____

General* | Borrower* | Subject Property* | Loan/Escrow* | MMW* | Contractors | Fees* | Project Notes | Work Write-Up* | Configuration*

Owner Type: Owner Occupant, Nonprofit, Government Agency
Purchase Type: Purchase, Refinance
Contingency: 0 Percent, 10 Percent, 15 Percent, 20 Percent
Options: HUD REO, Existing Debt, Condominium

Discount Points: 0
UFMIP Factor: 1.75
Borrower Paid Closing Costs + Prepays: _____
Other Fees: _____
Mortgage Payment: _____

As-Is Value: _____
CHUMS Number: _____
Required Adjustment: _____
FHA MIP Refund: _____

Remarks: _____

MMW is Maximum Mortgage Worksheet. This is typically used by our lender clients who specialize in the Streamlined k loans. Consultants don't typically fill out a MMW. I do for new loan agents that haven't yet mastered this form. This is the ONLY form a lender needs to fill out to add to their 203b paperwork to get it ready for underwriting. This is only for helping them.

Information Sheet - 203k [BETA]

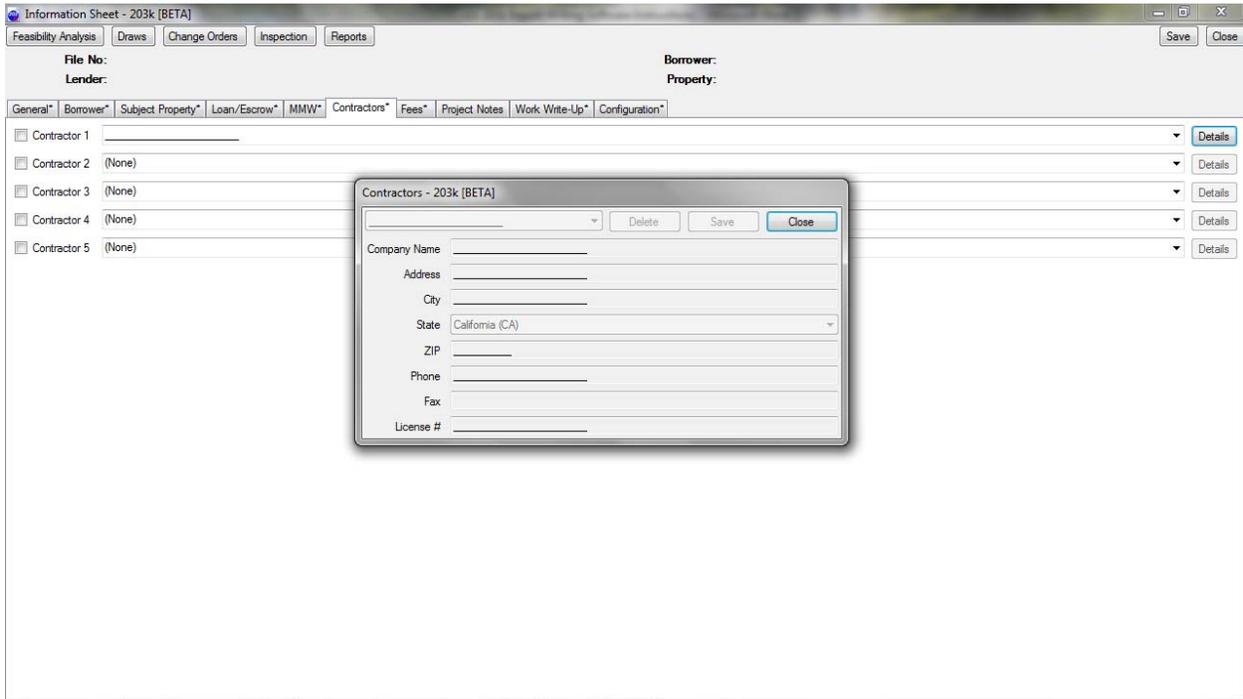
Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: _____ Borrower: _____
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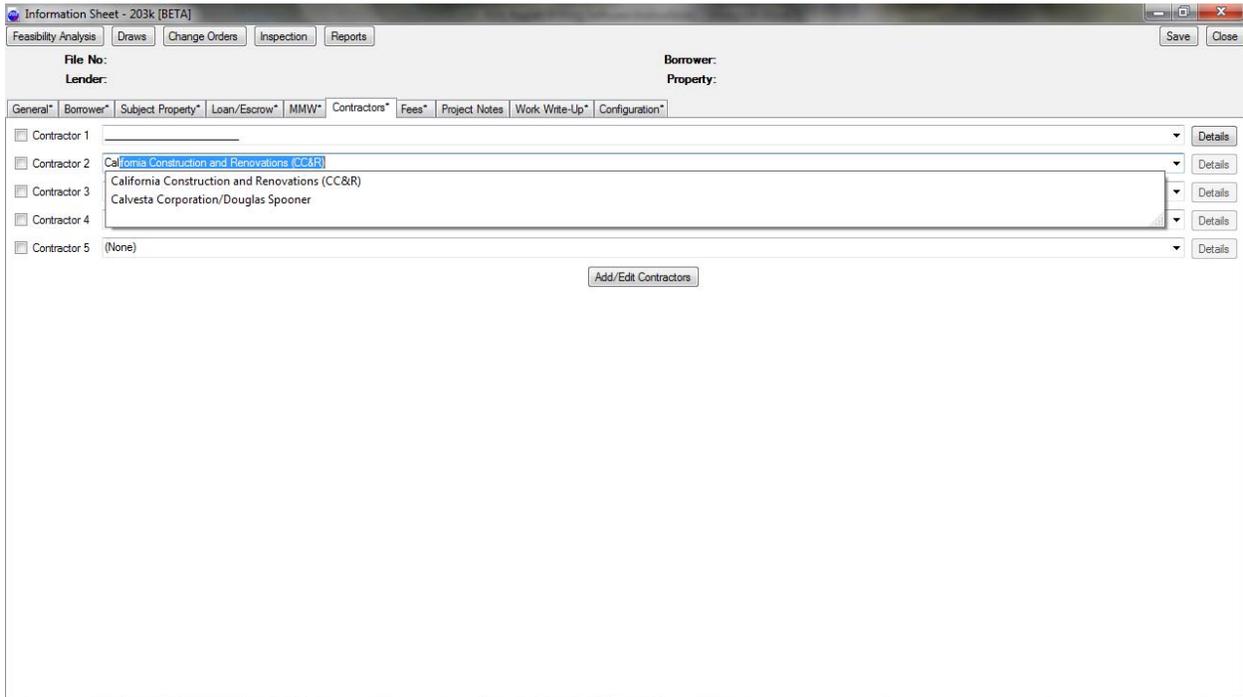
General* | Borrower* | Subject Property* | Loan/Escrow* | MMW* | Contractors | Fees* | Project Notes | Work Write-Up* | Configuration*

Contractor 1: None
Contractor 2: None
Contractor 3: 2001 Construction Group, 2M Building Inc/Marc Depew, A-1 Construction
Contractor 4: A & D Construction/Steven Diaz, A. Z. Custom Construction/Smart Builder Team, Acme Builders Incorporated/Paul Peczon
Contractor 5: Affordable Septic & Excavating, A.J.I. Construction, All City Construction, AllBayBuilders.com / Fred Peters, Anthony Lewis Incorporated, Artistic Homes, Arturo Dambacher Construction, Ashland Custom Homes, Assurance Construction/Dan Fotos, B G Pacific Construction Inc., Bakker Construction (Shawn), Bell Construction, Better Builders/ Steve Muratu, BH Construction/Bill Horvath, Bill R Kilpatrick, Bikkes Construction, Bo's Concrete & Construction, Bonini Construction / Bill Bonini, Borrower will complete this item, BP Weiland Homes Inc., Bravo Construction, Brian Hill, Contractor

Note the first contractor name is _____, look again...



This is always my number one contractor unless the borrower tells me they have a contractor. If they don't say anything then this is my number 1 contractor. A series of blank lines so we can write it in at the time of the initial inspection.



Start typing the name of the contractor you are seeking and your choices will be made available. Choose one. Continue this process until you have all contractors you recommend chosen. Then you MUST SELECT one by checking the small white box to the left of the name.

Information Sheet - 203k [BETA]

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: _____ Borrower: _____
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General* | Borrower* | Subject Property* | Loan/Escrow* | MMW* | Contractors* | Fees* | Project Notes | Work Write-Up* | Configuration*

<input checked="" type="checkbox"/>	Contractor 1		Details
<input type="checkbox"/>	Contractor 2	California Construction and Renovations (CC&R)	Details
<input type="checkbox"/>	Contractor 3	Calvesta Corporation/Douglas Spooner	Details
<input type="checkbox"/>	Contractor 4	W.A.Schilling, General Contractor	Details
<input type="checkbox"/>	Contractor 5	Better Builders/ Steve Muriu	Details

Add/Edit Contractors

123 Any Street (Johnny Jones) - Information Sheet - 203k [BETA]

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: 123ANYS Borrower: Johnny Jones
 Lender: Well Fargo Home Mortgage (New York) Property: 123 Any Street

General | Borrower | Subject Property | Loan/Escrow | MMW | Contractors | Fees | Project Notes | Work Write-Up | Configuration

Fees		Mileage	
Home Inspection	\$250.00	One-Way Mileage	0
Consultation	\$600.00	Free Miles	0
Feasibility		Cents Per Mile	55
Title Update	\$50.00	Maximum Fee	\$100.00
Architectural		Mileage Fee	\$0.00
Permit	\$500.00	Consultation Invoice	
Plan review, take of		Invoice #	
		Terms	
		Check #	
		Already Paid	

Draws

Number of Draws: 5

Draw Inspection Fee: \$225.00

Originating Lender Retains Funds

Print Invoice

Change Default Values

The home inspection fee doesn't carry over to anywhere else in the report. It is there to remind you that should you ever be sued, and I haven't been sued in over seventeen years, your fee is in two parts. One

is the home inspection or actually the “203k compliance report” and the other is for the bid specifications. In your training session ask me how this works if you are interested.

We have two “consultant entered” fees that will show up on the recap of the sub total form. If you take your training from us we’ll show you how to use this feature to get bigger fees.

123 Any Street (Johnny Jones) - Information Sheet - 203k [BETA]

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: 123ANYS Borrower: Johnny Jones
Lender: Well Fargo Home Mortgage (New York) Property: 123 Any Street

General | Borrower | Subject Property | Loan/Escrow | MMW | Contractors | Fees | Project Notes | Work Write-Up | Configuration

Fees

Home Inspection	\$250.00
Consultation	\$600.00
Feasibility	
Title Update	\$50.00
Architectural	
Permit	\$500.00
Plan review, take of	

Draws

Number of Draws	5
Draw Inspection Fee	\$225.00

Originating Lender Retains Funds

Mileage

One-Way Mileage	50
Free Miles	0
Cents Per Mile	56
Maximum Fee	\$100.00
Mileage Fee	\$56.00

Consultation Invoice

Invoice #	
Terms	
Check #	
Already Paid	

Print Invoice

Change Default Values

Mileage one way is entered and then “free miles” for those who insist you work off the old 1994 guideline giving 30 miles each way free. NOT typical any longer. Cost per mile is from the IRS website and currently is 56 cents per mile. We cap our mileage fee at \$100 as a courtesy to our Loan Officers who have to disclose our fees prior to us making the initial inspection.

123 Any Street (Johnny Jones) - Information Sheet - 203k (BETA)

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: 123ANYS Borrower: Johnny Jones
 Lender: Well Fargo Home Mortgage (New York) Property: 123 Any Street

General | Borrower | Subject Property | Loan/Escrow | MMW | Contractors | Fees | Project Notes* | Work Write-Up | Configuration

Copy and paste all of your emails related to this client in this space

You can copy and paste all of your emails and notes on the subject property in this section.

123 Any Street (Johnny Jones) - Information Sheet - 203k (BETA)

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: 123ANYS Borrower: Johnny Jones
 Lender: Well Fargo Home Mortgage (New York) Property: 123 Any Street

General | Borrower | Subject Property | Loan/Escrow | MMW | Contractors | Fees | Project Notes* | Work Write-Up | Configuration

General Description

This is a single family ranch style home with a stucco exterior and a composition shingle roof.

Lead based paint disclaimer: This home was built prior to 1978 and therefore likely has lead based paint. Warning: Repairs to residential properties may disturb materials containing lead-based paint and may release debris or dust contaminating lead. Lead is a chemical known to the State of California to cause cancer and birth defects or other reproducing harm. (This notice is provided in compliance with California's Proposition 65). For further information, contact your health care provider or an industrial hygienist. A 203k consultant is not an expert in lead, lead-based paint, or exposure to lead. This report is not intended to identify the presence or absence of lead or lead-based paint in the building inspected. Whether lead-based paint is present can only be determined by a certified lead inspector. For a list of certified lead inspectors, call the CA department of health services Lead Construction Information line at 800-597-5323.

Mold disclaimer: There may be health related issues associated with the structural repairs reflected in the inspection report referenced by this work authorization contract. These health issues are not limited to the possible release of mold spores during the course of repairs. "The Mike Young Team LLC" is not qualified to and do not render any opinion concerning such health issues or any special precautions. Any questions concerning health issues or any special precautions to be taken prior to or during the course of such repairs should be directed to a Certified Industrial Hygienist before any such repairs are undertaken. By executing this work authorization contract, customer acknowledges that he or she has been advised of the foregoing and has had the opportunity to consult with a qualified professional.

Scope of Rehabilitation

During the course of construction the roof will be replaced and a clear pest control report will be issued. Once these repairs are made the home will meet or exceed the FHA MPS. The roof has an estimated 2 years remaining economic life. The home will be habitable at COE. The home will be habitable 30-60 days after the COE.

My Wells Fargo vendor number is 06952
 My Bank of America vendor number is CFC0538604
 My Sun West Mortgage vendor number is K83547

Synopsis

The total cost of construction plus allowable fees comes to (0.c). (1) draws have been established @ (2.c) plus mileage. The last page of this report is an invoice. Throughout the report you may see PCR referred to and for the purposes of this report that means "Termite Report". The following people were present at the time of the inspection: , the borrower(s), & Mike Young, 203k consultant. This property inspection took place on 3//2013. The utilities were on/off at the time of the inspection therefore a 10% contingency is applicable.

for streamlined k loans

- 1) Start date to be 10/31/2011 or sooner
- 2) completion date to be 4/30/2012 or sooner
- 3) buyer not to be displaced for more than 30 days
- 4) no repairs are structural or non allowable

Print | Change Default Values

Work Write Up is the first page of your report and is likely the last form you will fill out prior to printing. If you put your cursor in one of the sections it will expand so you can see more of that section.

123 Any Street (Johnny Jones) - Information Sheet - 203k [BETA]

Feasibility Analysis | **Draws** | Change Orders | Inspection | Reports

File No: 123ANYS Borrower: Johnny Jones
 Lender: Well Fargo Home Mortgage (New York) Property: 123 Any Street

General | Borrower | Subject Property | Loan/Escrow | MMW | Contractors | Fees | Project Notes | Work Write-Up | **Configuration**

General Description

This is a single family ranch style home with a stucco exterior and a composition shingle roof.

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The 203k compliance inspection while addressing the 35 key items in the HUD/FHA format is "not considered a home inspection report". A home inspection report must not make the types of judgement calls we make every day. They tend to "recommend repairs" and we specify repairs.

Note: All chimney's must have spark arrestors, all homes must now have smoke and CO detectors installed and working prior to a final draw whenever permits are required for a project.

Our liability for errors or omissions is expressly limited to the amount paid for the respective report(s). If there are any corrections needed to this report please contact us asap and we will be happy to consider them. If there is no communication for 30 days it will be deemed correct.

Scope of Rehabilitation

During the course of construction the roof will be replaced and a clear pest control report will be issued. Once these repairs are made the home will meet or exceed the FHA MPS. The roof has an estimated 2 years remaining economic life. The home will be habitable at COE. The home will be habitable 30-60 days after the COE.

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 My Bank of America vendor number is CFC0538604

Synopsis

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for streamlined k loans
 1). Start date to be 10/31/2011 or sooner

Print | Change Default Values

Then click in the next box to get this result

123 Any Street (Johnny Jones) - Information Sheet - 203k [BETA]

Feasibility Analysis | **Draws** | Change Orders | Inspection | Reports

File No: 123ANYS Borrower: Johnny Jones
 Lender: Well Fargo Home Mortgage (New York) Property: 123 Any Street

General | Borrower | Subject Property | Loan/Escrow | MMW | Contractors | Fees | Project Notes | Work Write-Up | **Configuration**

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[My Bank of America vendor number is CFC0538604](#)
[My Sun West Mortgage vendor number is K03547](#)

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for streamlined k loans
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Print | Change Default Values

I populate it with my vendor numbers so I don't have to look them up every time.

123 Any Street (Johnny Jones) - Information Sheet - 203k (BETA)

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: 123ANYS Borrower: Johnny Jones
 Lender: Well Fargo Home Mortgage (New York) Property: 123 Any Street

General | Borrower | Subject Property | Loan/Escrow | MMW | Contractors | Fees | Project Notes | Work Write-Up | Configuration

Type of Loan

203(k)

Conventional Loan Guaranteed by _____

Streamlined (k)

Additional Provisions

If the amount charged is different than our expanded HUD Guideline for charges the difference will be adjusted in escrow. Our liability for errors or omissions is expressly limited to the amount paid for the respective report(s). If there are any corrections needed to this report please contact us asap and we will be happy to consider them. If there is no communication for 30 days it will be deemed correct.

Change Default Values

The configuration tab is for choosing the loan type and is typically not viewed for standard 203k loans. The “additional provisions” area is for the consultant agreement where I will insert this comment “If the amount charged is different than our expanded HUD Guideline for charges the difference will be adjusted in escrow. Our liability for errors or omissions is expressly limited to the amount paid for the respective report(s). If there are any corrections needed to this report please contact us asap and we will be happy to consider them. If there is no communication for 30 days it will be deemed correct.”

123 Any Street (Johnny Jones) - Information Sheet - 203k (BETA)

Feasibility Analysis | Draws | Change Orders | Inspection | Reports

File No: 123ANYS Borrower: Johnny Jones
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General | Borrower | Subject Property | Loan/Escrow | MMW | Contractors | Fees | Project Notes | Work Write-Up | Configuration

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My Sun West Mortgage vendor number is K83547

Synopsis

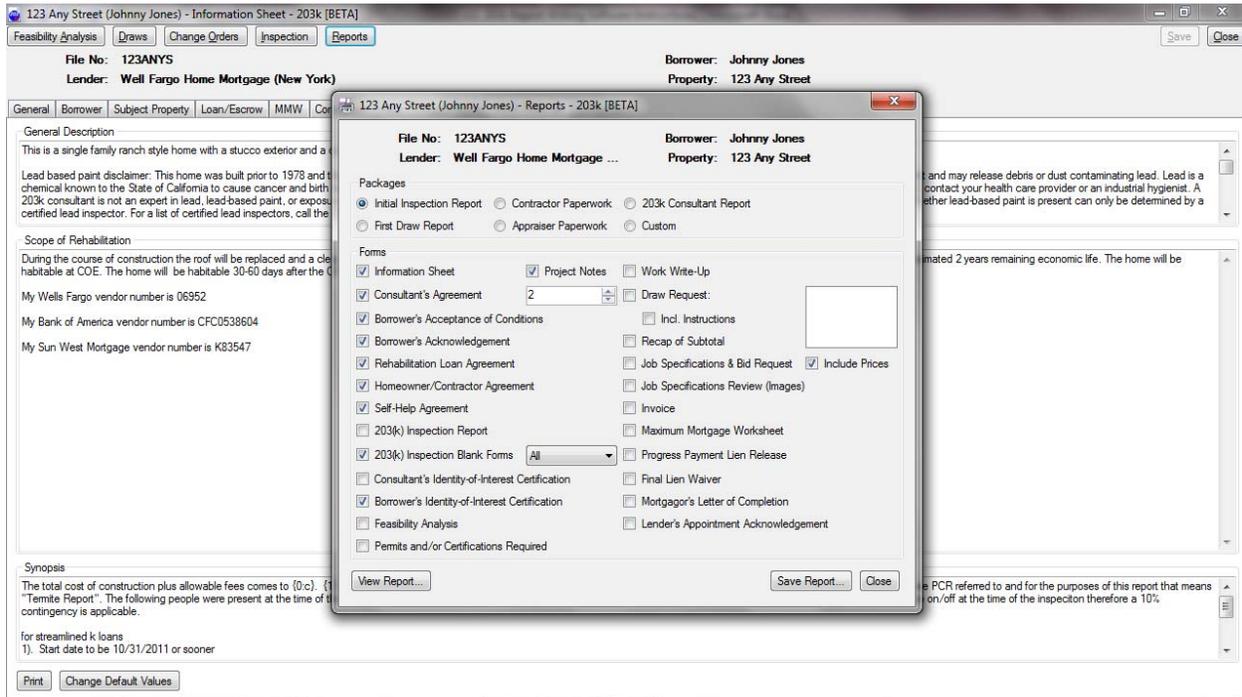
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for streamlined k loans

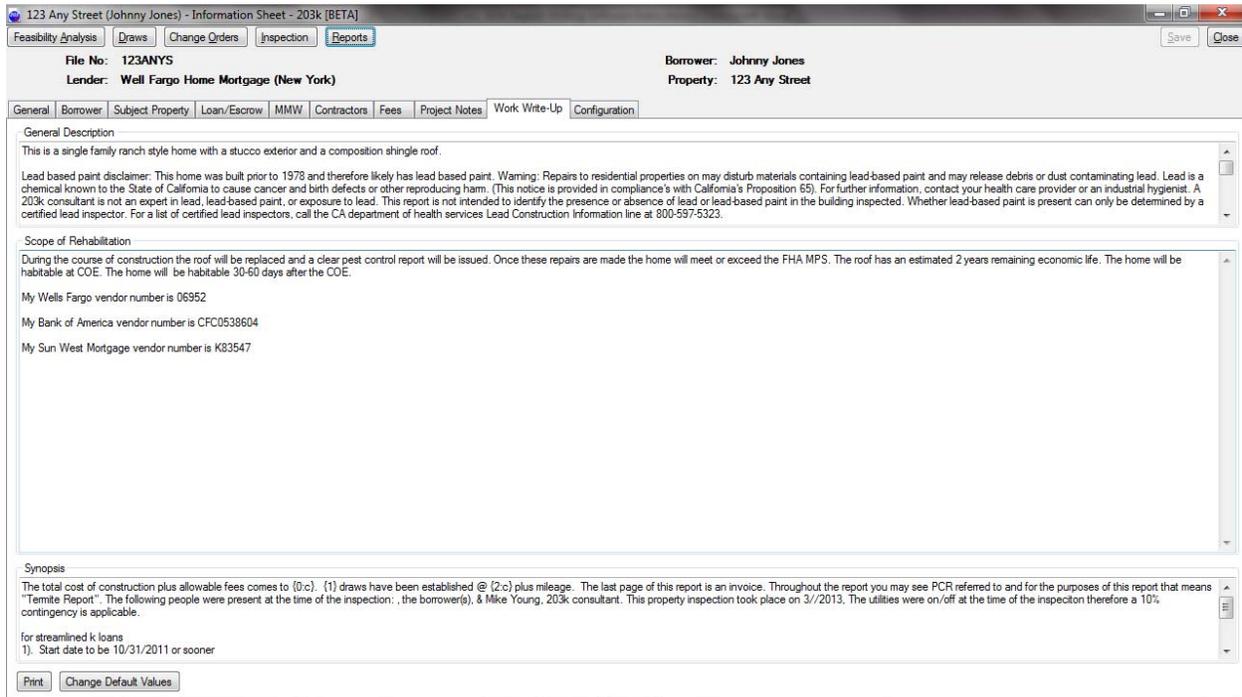
1). Start date to be 10/31/2011 or sooner

Print Change Default Values

Go to to the “reports” tab and choose “initial inspection” report



Once you choose the report package you want the individual forms will be checked so you can see what you will be printing. I personally don't use the 203k Inspection Blank Forms as they are five pages long, I use the “feasibility analysis” forms as they are only 3 pages long and sufficient to remind me to look at each category. It merely helps you in your early inspections to remember to look everywhere.



123 Any Street (Johnny Jones) - Information Sheet - 203k [BETA]

Feasibility Analysis | **Draws** | Change Orders | Inspection | Reports

123 Any Street (Johnny Jones) - Draw Requests - 203k [BETA]

Draw 1 | New | Delete | Print | Save | Close

File No: 123ANYS Borrower: Johnny Jones
 Lender: Well Fargo Home Mortgage (New York) Property: 123 Any Street

Draw	Draw Back	Construction Item	Total Escrow	Previous Draws (%)	Remaining (%)	Current Draw Amount (%)	
1.		Masonry	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	1.
2.		Siding	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	2.
3.		Gutters & Downspouts	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	3.
4.		Roof	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	4.
5.		Shutters	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	5.
6.		Exteriors	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	6.
7.		Walks	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	7.
8.		Driveways	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	8.
9.		Exterior Paint	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	9.
10.		Caulking	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	10.
11.		Fencing	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	11.
12.		Grading	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	12.
13.		Windows	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	13.
14.		Weather-Stripping	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	14.
15.		Exterior Doors	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	15.
16.		Interior Doors	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	16.
17.		Partition Wall	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	17.
18.		Plaster/Drywall	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	18.
19.		Decorating	\$0.00	\$0.00 0 %	\$0.00 0 %	\$0.00 0 %	19.

Print | Change Default Values

Once you create it you can close it and then as you enter your specs it will automatically fill in the values in column 1.

123 Any Street (Johnny Jones) - Information Sheet - 203k [BETA]

Feasibility Analysis | **Draws** | Change Orders | Inspection | Reports

File No: 123ANYS Borrower: Johnny Jones
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General | Borrower | Subject Property | Loan/Escrow | MMW | Contractors | Fees | Project Notes | Work Write-Up | Configuration

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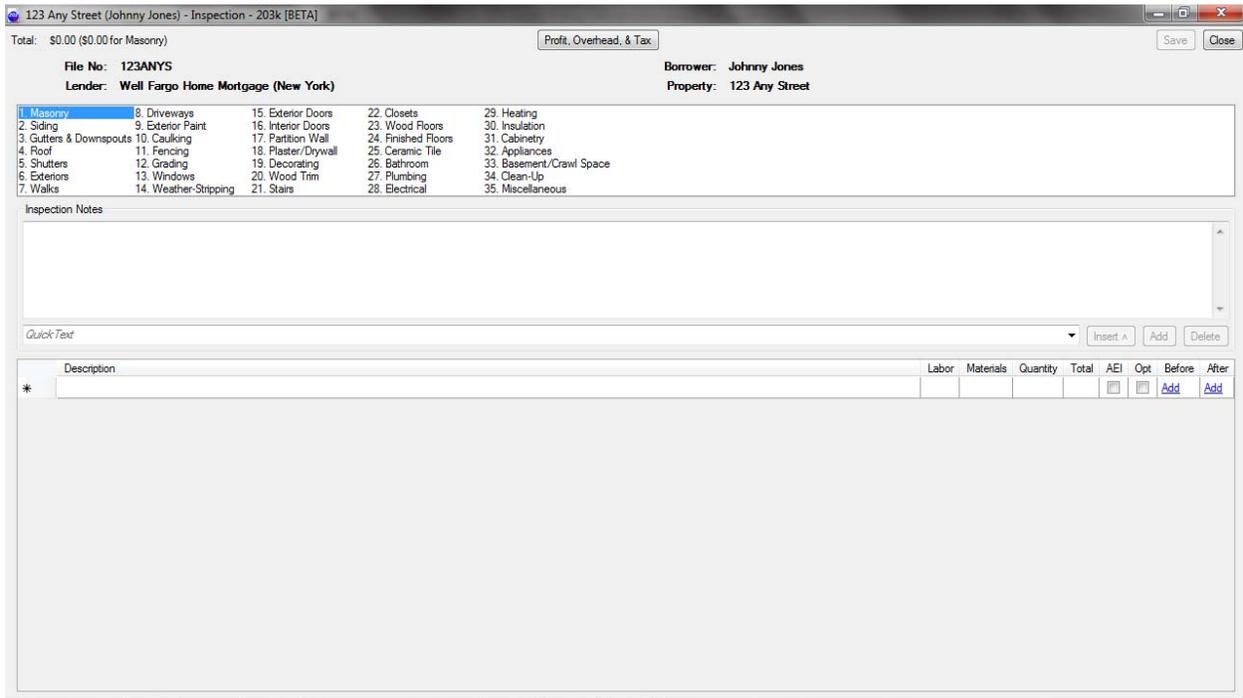
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for streamlined k loans
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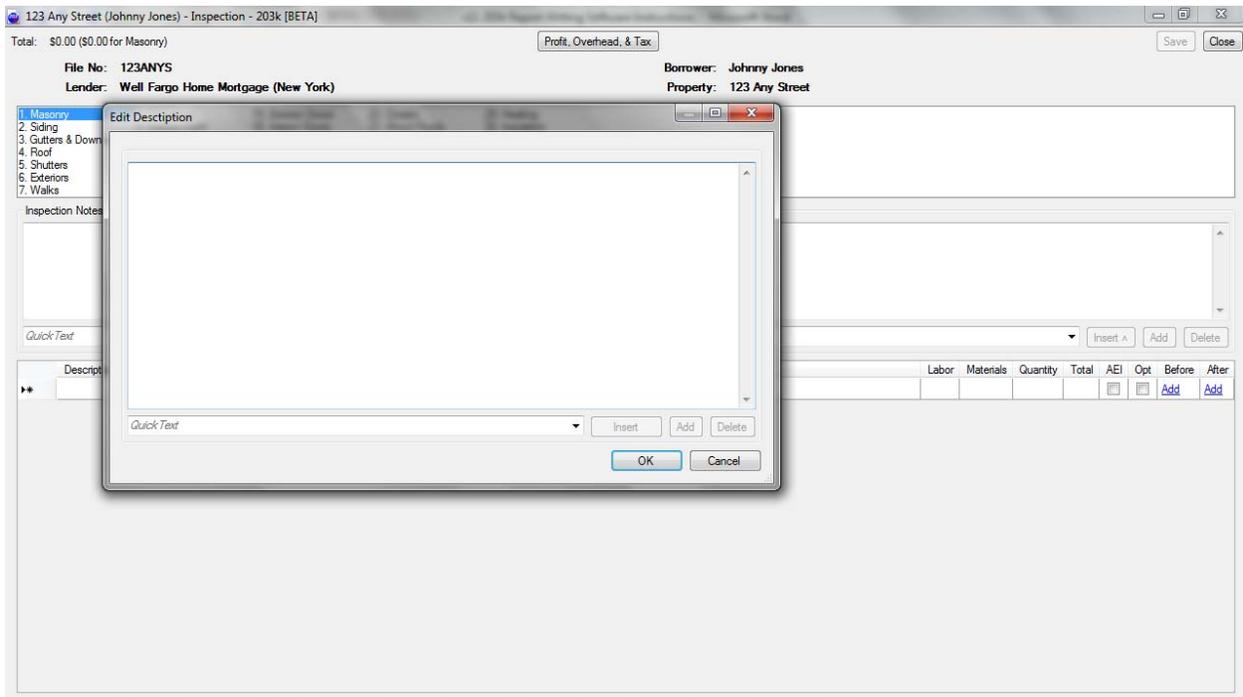
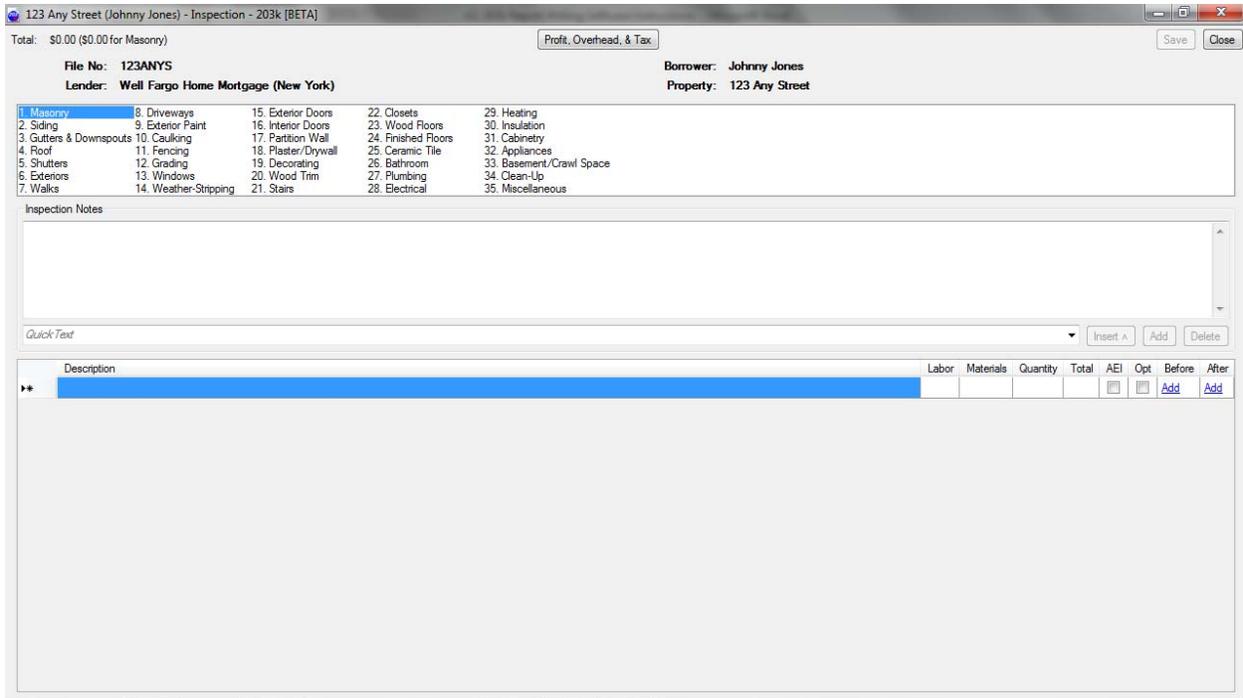
Now once you make your inspection and return to the computer go to the “inspection” tab. This is where most of your work will take place



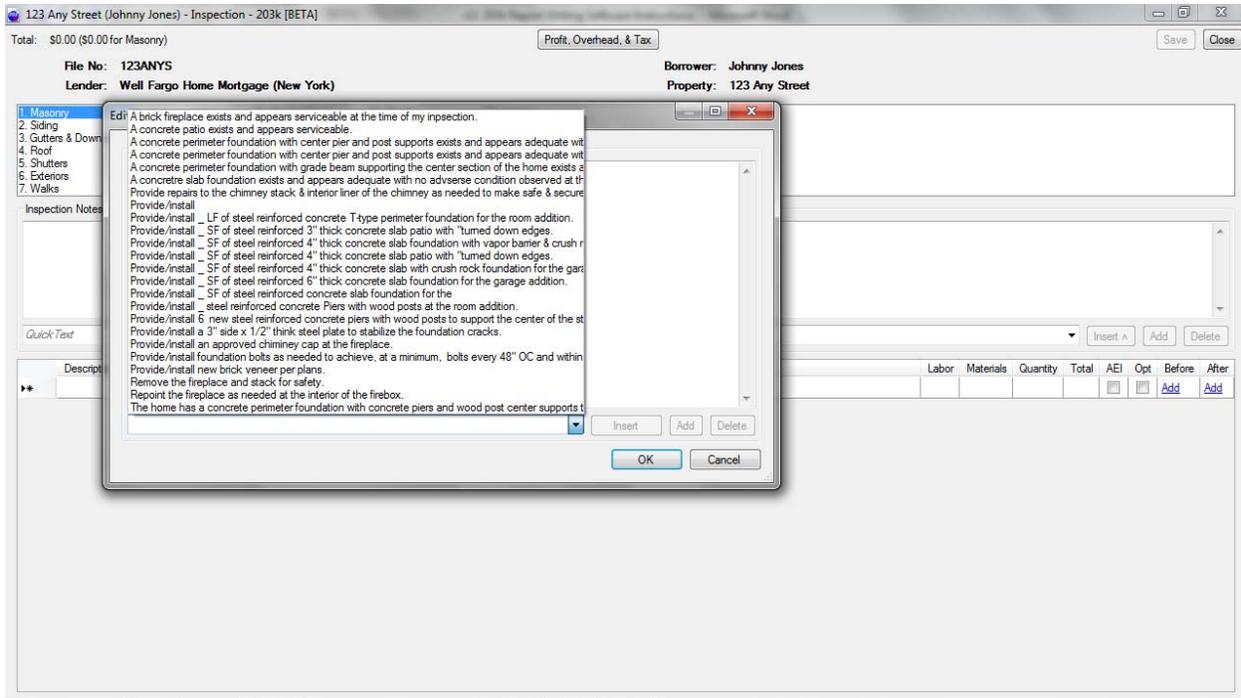
The HUD 35 line items are listed in the first box and Masonry is selected. The next box has your “inspection notes” and is your 203k compliance inspection sometimes referred to as a “home inspection” it clearly isn’t a home inspection.

This is where you will write about the home, good or bad. Describe what it is then the condition of it.

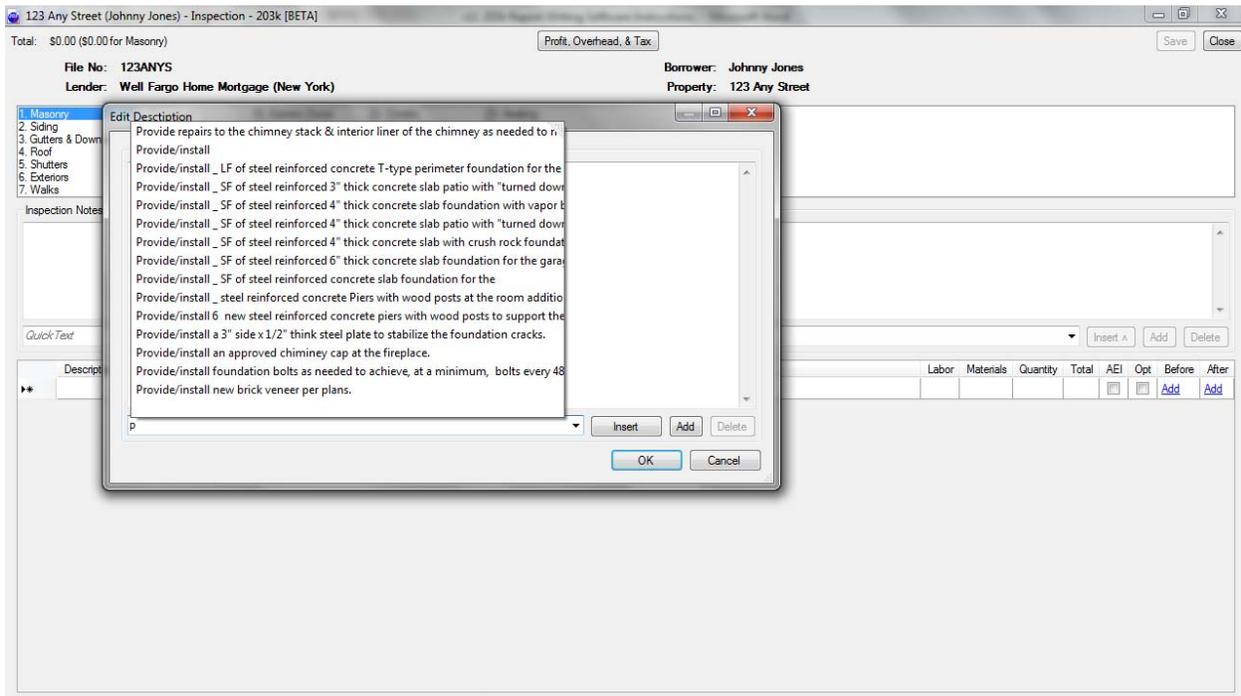
The next group is for your bid specifications... each line represents a line in your bid specs. When you click in line one it will open and you can see the entire thought in one screen.



Note there is a “quick text” area and an arrow to the right of it. This is for standard comments you may develop over time. In the mean time we will provide you with a database that has our “standard comments” which you can add to, modify, delete, and add your own.



Rather than pull it down as above you can merely start typing and it will narrow the selection for you.



If you are writing the inspection report, make a selection of what you want to type and then use the "insert" button to the right to place it in the inspection box.

123 Any Street (Johnny Jones) - Inspection - 203k [BETA]

Total: \$0.00 (\$0.00 for Masonry) Profit, Overhead, & Tax Save Close

File No: 123ANYS **Borrower:** Johnny Jones
Lender: Well Fargo Home Mortgage (New York) **Property:** 123 Any Street

1. Masonry*	8. Driveways	15. Exterior Doors	22. Closets	29. Heating
2. Siding	9. Exterior Paint	16. Interior Doors	23. Wood Floors	30. Insulation
3. Gutters & Downspouts	10. Caulking	17. Partition Wall	24. Finished Floors	31. Cabinetry
4. Roof	11. Fencing	18. Plaster/Drywall	25. Ceramic Tile	32. Appliances
5. Shutters	12. Grading	19. Decorating	26. Bathroom	33. Basement/Crawl Space
6. Exteriors	13. Windows	20. Wood Trim	27. Plumbing	34. Clean-Up
7. Walks	14. Weather-Stripping	21. Stairs	28. Electrical	35. Miscellaneous

Inspection Notes

A brick fireplace exists and appears serviceable at the time of my inspection.
A concrete patio exists and appears serviceable.
A concrete perimeter foundation with center pier and post supports exists and appears adequate with no adverse condition observed at the time of the inspection.
A concrete perimeter foundation with center pier and post supports exists and appears adequate with no adverse condition observed at the time of the inspection. - \$150 + 100 = 250/LF
A concrete perimeter foundation with grade beam supporting the center section of the home exists and appears adequate with no adverse condition observed at the time of the inspection.
A concrete slab foundation exists and appears adequate with no adverse condition observed at the time of the inspection.
Provide repairs to the chimney stack & interior liner of the chimney as needed to make safe & secure.
Provide/install
Provide/install _ LF of steel reinforced concrete T-type perimeter foundation for the room addition.
Provide/install _ SF of steel reinforced 3" thick concrete slab patio with "turned down edges.
Provide/install _ SF of steel reinforced 4" thick concrete slab foundation with vapor barrier & crush rock base per plans for the garage addition.
Provide/install _ SF of steel reinforced 4" thick concrete slab patio with "turned down edges.
Provide/install _ SF of steel reinforced 4" thick concrete slab with crush rock foundation for the garage addition per plans.
Provide/install _ SF of steel reinforced 6" thick concrete slab foundation for the garage addition.
Provide/install _ SF of steel reinforced concrete slab foundation for the
Provide/install _ steel reinforced concrete piers with wood posts at the room addition.
Provide/install 6 new steel reinforced concrete piers with wood posts to support the center of the structure where the patio piers are currently in place.
Provide/install a 3" side x 1/2" thick steel plate to stabilize the foundation cracks.
Provide/install an approved chimney cap at the fireplace.
Provide/install foundation bolts as needed to achieve, at a minimum, bolts every 48" OC and within 12" of any cut in the sill plate.
Provide/install new brick veneer per plans.
Remove the fireplace and stack for safety.
Repoint the fireplace as needed at the interior of the firebox.
The home has a concrete perimeter foundation with concrete piers and wood post center supports that appear adequate and serviceable overall.

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File No: 123ANYS **Borrower:** Johnny Jones
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Inspection Notes

A concrete perimeter foundation with center pier and post supports exists and appears adequate with no adverse condition observed at the time of the inspection.

Description	Labor	Material	Insert the QuickText into the inspection notes.			
* [Redacted]			\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	Add Add

123 Any Street (Johnny Jones) - Inspection - 203k [BETA]

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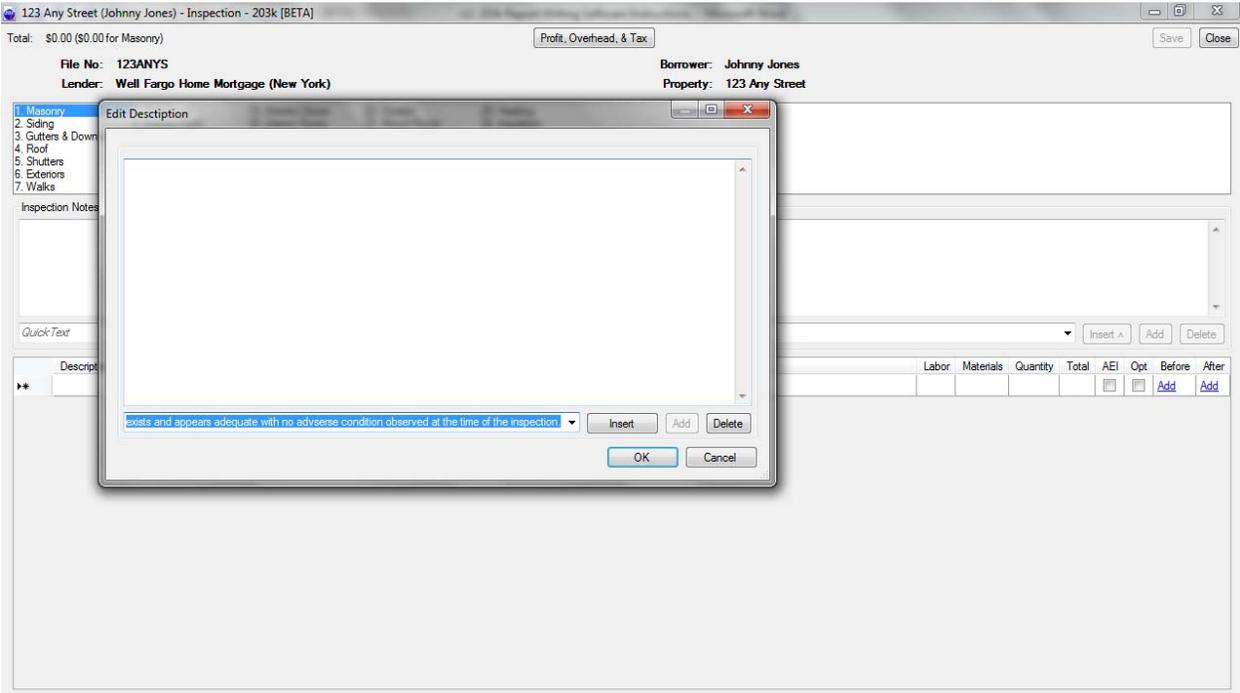
A concrete perimeter foundation with center pier and post supports exists and appears adequate with no adverse condition observed at the time of the inspection.

Description	Labor	Materials	Quantity	Total	AEI	Opt	Before	After
* <input type="text"/>				\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Add"/>	<input type="button" value="Add"/>

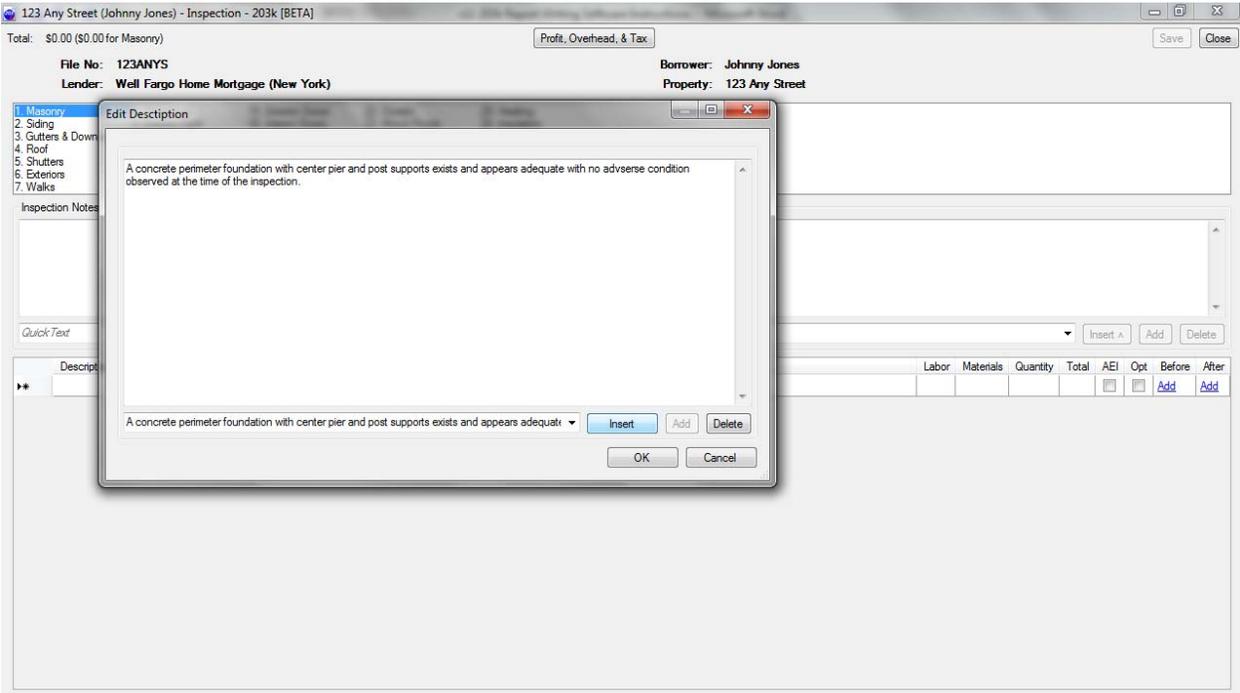
Additional comments can be added the same way or you can type your own comment.

*The most efficient use of the software would be to write the inspection report then if there are any issues go to the specs below and write the repair for it. This way once you complete the inspection report you also are ready for a first draft.

Writing the specification of repairs



Now there is an "insert" button to the right to place the "quick text" in the box above making it ready to be placed in the bid specs.



Then hit "OK" to insert it as a bid line item

123 Any Street (Johnny Jones) - Inspection - 203k [BETA]

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Inspection Notes

QuickText Insert ^ Add Delete

Description	Labor	Materials	Quantity	Total	AEI	Opt	Before	After
A concrete perimeter foundation with center pier and post supports exists and appears adequate with no adverse condition observed at the time of the inspection.				\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	Add	Add
				\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	Add	Add
*					<input type="checkbox"/>	<input type="checkbox"/>	Add	Add

Now you are ready to enter the values for labor, materials and quantity.

*If you have no repairs in this section you can merely leave the description blank and enter a value of "0" for labor, materials and quantity. This will cause the finished report to print "no requirement" for the bid spec line item which is a requirement for line items not work specified. See next slide...

		Labor	Materials	Quantity	Total
-1-	Masonry				
1	<NO REQUIREMENT>			0	\$0.00
Sub-Total		\$0.00	\$0.00	--	\$0.00
Grand Total		\$0.00	\$0.00	--	\$0.00

*It is not necessary to type "no requirement" the program will do it for you.

123 Any Street (Johnny Jones) - Inspection - 203k [BETA]

Total: \$1,800.00 (\$1,800.00 for Masonry)

Profit, Overhead, & Tax

File No: 123ANYS
 Lender: Well Fargo Home Mortgage (New York)

Borrower: Johnny Jones
 Property: 123 Any Street

1. Masonry	8. Driveways	15. Exterior Doors	22. Closets	29. Heating
2. Siding	9. Exterior Paint	16. Interior Doors	23. Wood Floors	30. Insulation
3. Gutters & Downspouts	10. Caulking	17. Partition Wall	24. Finished Floors	31. Cabinetry
4. Roof	11. Fencing	18. Plaster/Drywall	25. Ceramic Tile	32. Appliances
5. Shutters	12. Grading	19. Decorating	26. Bathroom	33. Basement/Crawl Space
6. Exteriors	13. Windows	20. Wood Trim	27. Plumbing	34. Clean-Up
7. Walks	14. Weather-Stripping	21. Stairs	28. Electrical	35. Miscellaneous

Inspection Notes

A concrete perimeter foundation with center pier and post supports exists and appears adequate with no adverse condition observed at the time of the inspection.

QuickText

Description	Labor	Materials	Quantity	Total	AEI	Opt	Before	After
Provide/Install 6 new steel reinforced concrete piers with wood posts to support the center of the structure where the patio piers are currently in place.	\$1,200.00	\$100.00	6	\$1,800.00	<input type="checkbox"/>	<input type="checkbox"/>	Add	Add
**					<input type="checkbox"/>	<input type="checkbox"/>	Add	Add

The labor is total labor for that line item, the materials cost is per SF, LF, or each – then times the quantity. Typically I will insert the materials cost then quantity, once I verify that is correct I enter the labor last.

AEI = Allowable Energy Improvements. This is to help fill out the MMW or Maximum Mortgage Worksheet for your newer loan officers who might really appreciate your MMW on the project to help them figure out where things go. This is a major sales tool for you. By checking the AEI boxes for energy related items your MMW fills in the EEM section. Since this is for EEM most of the time it will be in insulation, appliances, plumbing for water heaters, heating, AC, and ductwork, items that have energy star ratings.

Next box is Op which means Optional. In some cases the borrower may want have a larger project that all of a sudden becomes a smaller project due to budget restraints. If you have marked the Op button they will see the items that are optional and they can strike them out.

The next box to the right of the bid specs is “Before” then “After” – this is for photos. This is very handy for bringing into your photos up as you write your report. You do have to find the file once per session, after that as you call for a photo it will open to that same folder. Once the photos is loaded it can be recalled in a second.