loantrak

MSA National

User Guide for LoanTrak

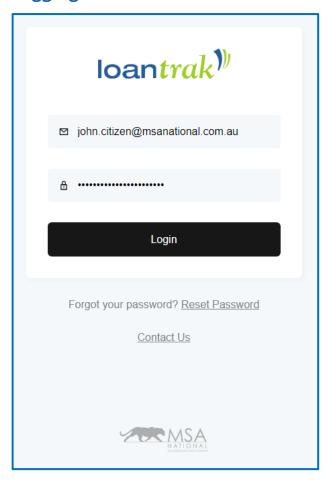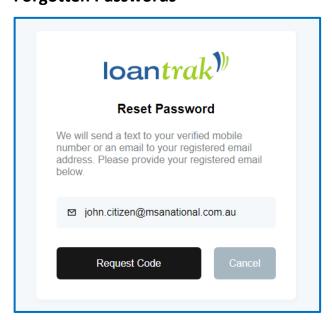### Release: March 2022

Table of Contents

Logging In

You will have received your username and password via email from MSA National which will enable you to login to *LoanTrak* to view your loans.

Your username is your email address. If you do not have a username or have forgotten your username, please contact us at loantraksupport@msanational.com.au

To login, go to https://www.loantrak.com.au and enter your username (*the email address you provided during the registration process*) and your password, and select **Login**.

Forgotten Passwords

If you can't remember your password, click the **Reset Password** link, located beneath the Login button.
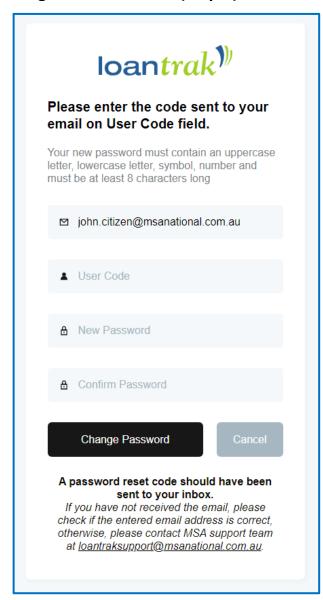
Type your email address into the *Username* field and select **Request Code**.

Forgotten Passwords (step 2)

loan*trak*

Please enter the code sent to your email on User Code field.

Your new password must contain an uppercase letter, lowercase letter, symbol, number and must be at least 8 characters long

✉ john.citizen@msanational.com.au

👤 User Code

🔒 New Password

🔒 Confirm Password

Change Password   Cancel

A password reset code should have been sent to your inbox.
If you have not received the email, please check if the entered email address is correct, otherwise, please contact MSA support team at loantraksupport@msanational.com.au.

Users employed by a Lender, Mortgage Manager or Aggregator will receive their Security Code via email. All other users will receive their Security Code via SMS. The Security Code is valid for 30 minutes from receipt.

You will be prompted to create a new password which must include at least:

- 8 characters
- 1 uppercase character
- 1 lowercase character
- 1 special character/symbol
- 1 number

Insert the Security Code into the **Security Code** field, and select **Change Password**.

You may now log in to *LoanTrak* using your new password.

NOTE: If you are unable to access the email address associated with your account, or are having other login issues, please click the **Contact Us** button on the login page or emailing us on loantraksupport@msanational.com.au
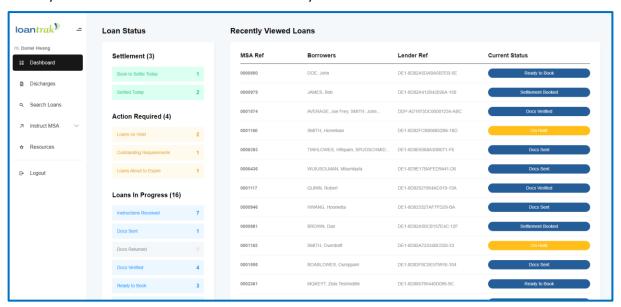
Dashboard

Once you have logged in, you will be automatically redirected to the *LoanTrak* dashboard page. This page shows you information on all New Loans linked to your account.

*Please allow additional loading time if you have a large number of loans.

Using the navigation bar at the left hand side of the page, you can navigate to the **Dashboard**, **Discharges**, **Search Loans**, **Instruct MSA** and **Resources** page. Depending on your access level you may also have access to additional functions.

When you have finished using *LoanTrak*, always remember to end your session by selecting Logout at the bottom of this menu.
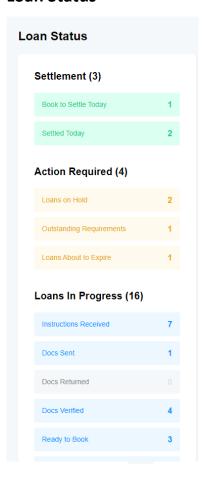
The *LoanTrak* **Dashboard** page is divided into two main columns: *Loan Status* and *Recently Viewed Loans*.

Loan Status

Loan Status

Settlement (3)

Book to Settle Today	1
Settled Today	2

Action Required (4)

Loans on Hold	2
Outstanding Requirements	1
Loans About to Expire	1

Loans In Progress (16)

Instructions Received	7
Docs Sent	1
Docs Returned	0
Docs Verified	4
Ready to Book	3

This section allows you to see a summary of your in-progress New Loans and their status.

Each displayed **Status** is a quick filters and by clicking a **Status**, *LoanTrak* will display a list of all loans within that status.

The number displayed beside each **Status** represents the number of loans within that status.

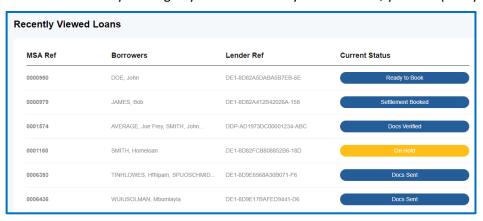The **Loan Status** section is divided into 3 parts:

- **Settlement** – loans booked to settle some time today and loans that have already settled today.

- **Action Required** – MSA is waiting on the broker, lender, solicitor or borrower to provide outstanding requirements, additional information or confirmation.

- **Loans In Progress** – all in-progress loans are sorted according to their current milestone stage (eg Instructions Received, Docs Sent, Docs Received, etc)

Colour Coding:

- Blue – MSA is currently working on the loan
- Amber – MSA is waiting on an action from a 3rd party
- Grey – there are no loans within that status

Recently Viewed Loans

On the right hand side of the home page you can see a list of your most recently accessed loans and their current statuses. By clicking any of these recently viewed loans, you can quickly access a loan's **Detail Page**.
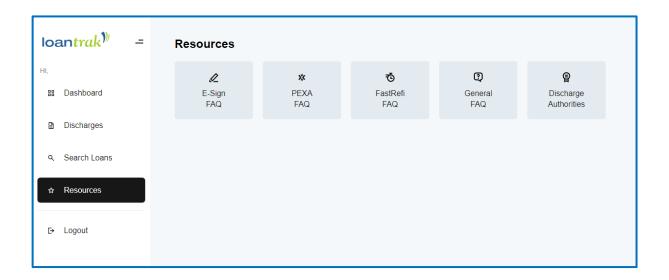
Recently Viewed Loans

MSA Ref	Borrowers	Lender Ref	Current Status
0000950	DOE, John	DE1-8D82A5DABA5B7EB-5E	Ready to Book
0000979	JAMES, Bob	DE1-8D82A412B42026A-158	Settlement Booked
0001574	AVERAGE, Joe Frey, SMITH, John...	DDP-AD1973DC00001234-ABC	Docs Verified
0001160	SMITH, Homeloan	DE1-8D82FCB808852B6-18D	On Hold
0006393	TINHLOWES, Hfhipam, SPUOSCHMID...	DE1-8D9E6568A30B071-F6	Docs Sent
0006436	WUIUSOLMAN, Mbumlayla	DE1-8D9E17BAFED9441-D6	Docs Sent

Resources

The **Resources** page contains direct links to helpful resources. Selecting any of these links will take you directly to the relevant document or page on the MSA National website.
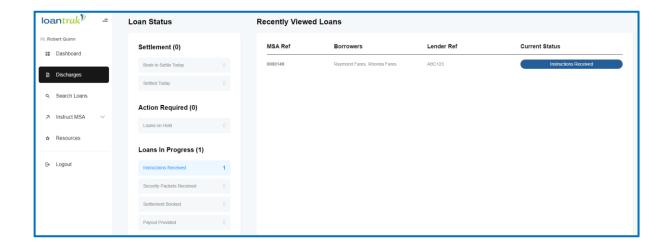
Discharges

The **Discharges** page shows a summary of all Discharges associated with your account.

This page is divided into two main columns (*Loan Status* and *Recently Viewed Loans*) and works the same way as the **Dashboard** page.

Quick Search

At the top right of *LoanTrak*, there is a search-bar to search through all loans associated with your account.

As you type into this field, the quick-search will return matches for the *Lender Loan Reference Number*, the *Loan Description*, the *MSA Loan Reference Number* and the *Name of the Lender*.

To navigate to any of these results, simply click on any of them.

To dismiss the search bar, click anywhere else on the page or click the 'cancel' button.

For a more detailed search function with more customisable fields, you can use the **Search Loans** option on the left of the page.
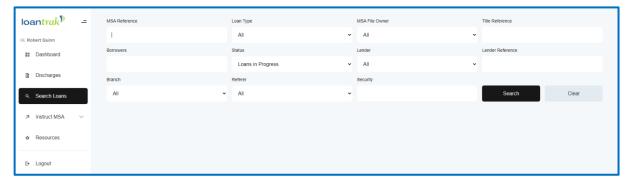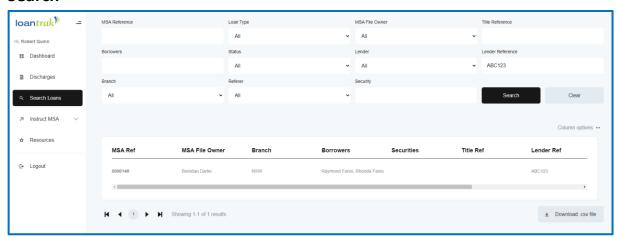
Search Loans – Advanced Search

To search through any of your loans, you have two options. The first is to navigate to the **Advanced Search** page using the **Search Loans** tab in the navigation bar on the left. The second, is by selecting any of the **Loan Status** milestones on either the **Dashboard** or **Discharges** pages.

LoanTrak allows you to use multiple options when searching for your loans.

Search

Clicking **Search** will search the database for these fields, and display any results found in your web-browser in a list format.

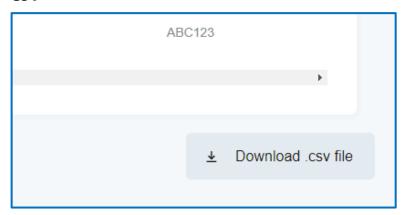Select any of the displayed loans to view the loan's **Detail** page.

Ten results will be displayed per page. To display more results, navigate to the next page or the last page using the arrows found at the bottom of the screen. Alternatively, you are able to select a specific page number to navigate to.
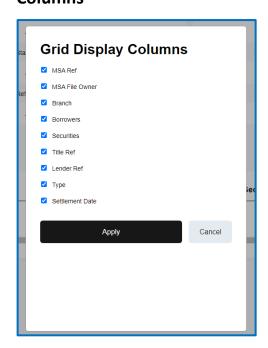
CSV

Download the search results by clicking the **Download .csv file** button to collate the results of your search in a Comma Separated Values (.csv) file and downloaded to your computer.

This file can then be opened and filtered in programs such as Microsoft Excel.

Clear

The Clear button can be used to clear all the data you have entered into the search fields

Columns

The *Column Options* button can be used to specify which fields to display in the results from the search.

By default, all fields will be displayed.

To turn a field off or back on, select the checkbox next to the respective field.

Once you have selected your fields of interest, click the **Apply** button to apply the changes or click the **Cancel** button to discard the changes which were made.
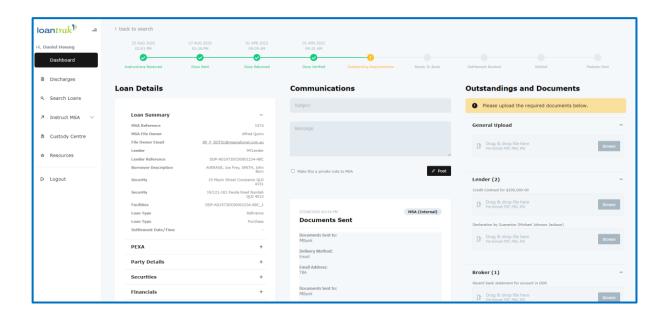
Details of Your Loan

You can view the details of each loan by selecting a loan from your **Dashboard** or from a **Search** result.

The page is split into four key sections:

1. Progress Bar

2. Loan Details

3. Communications
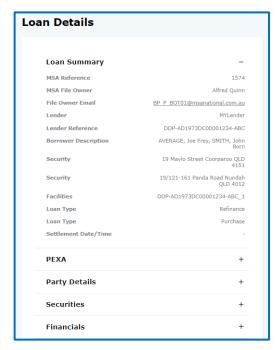
4. Outstandings and Documents

Progress Bar

The **Progress Bar** for each loan is located at the top of the Loan Details page.

This bar indicates the current status of the loan. Milestones that are coloured in green are completed, whereas orange milestones require action, and grey milestones are not yet due. Completed milestones are date and time stamped.

Loan Details

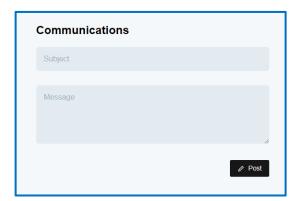The Loan Details section contains key details for a loan. By default, the Loan Summary is displayed.

To display other details about the loan, scroll and expand the tabs by clicking the "+" icon.
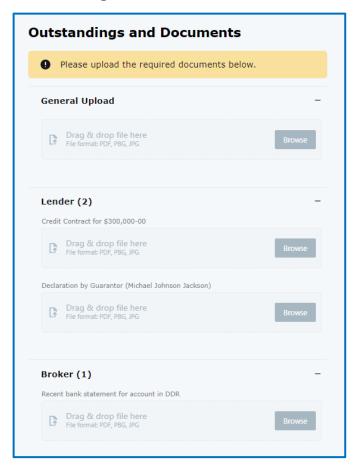
Communications

The Communications tab can be used to send messages to the MSA National paralegal who is the File Owner for that loan.

To send a message, type the subject of the message into the *Subject* box and the content of your message into the *Message* box.

When your message is complete, click the **Post** button, and the message will be sent to the MSA National File Owner and will be saved as a matter note in *LoanTrak*.

Outstandings and Documents

The **Outstandings and Documents** section displays all the *outstanding requirements* that are needed to progress the loan.

The outstanding requirements are grouped by party responsible for actioning that outstanding requirement (ie Broker, Solicitor, Lender, Borrower)

By either clicking on the outstanding item, or by dragging a file from your desktop onto it, you can instantly upload a .docx / .doc / .pdf / .jpeg / .png / .bmp / .gif file into our system to assist in the resolution of this outstanding requirement, instantly notifying the MSA National File Owner.
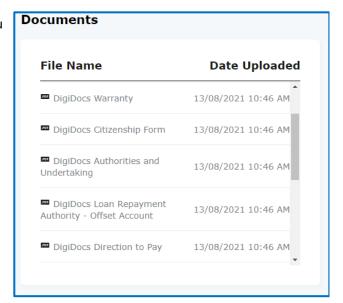
Beneath the *Outstanding Requirements* section, you can find a list of read-only copies of the **Documents** MSA National has produced for this loan.

Please note, these are watermarked copies for your information only and cannot be printed for the purpose of signing. The borrowers will be sent their loan documents for signing as per lender instructions. Some documents may not be available on *LoanTrak* for compliance reasons.

For any questions about the content of these documents, please contact your MSA National File Owner.

Documents

File Name	Date Uploaded
PDF DigiDocs Warranty	13/08/2021 10:46 AM
PDF DigiDocs Citizenship Form	13/08/2021 10:46 AM
PDF DigiDocs Authorities and Undertaking	13/08/2021 10:46 AM
PDF DigiDocs Loan Repayment Authority - Offset Account	13/08/2021 10:46 AM
PDF DigiDocs Direction to Pay	13/08/2021 10:46 AM

Note:

Clicking on the document will open a new tab or will download the file depending on your browser settings for PDF documents. Please ensure your settings are not blocking pop-ups.